HIGHLANDS VISITOR SURVEY, 1997
SKYE AND LOCHALSH

Final Report

Prepared for : ***Highlands & Islands Enterprise***
Highland Council
Highlands of Scotland Tourist Board
Skye and Lochalsh Enterprise

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Contents

Executive summary

- 97% of visitors to Skye and Lochalsh were staying away from home, predominantly on holiday. Only 3% of visitors were on a day out from home;

- The majority of visitors to Skye were on a touring trip, staying in more than one location (65%), in contrast to the Highlands as a whole where the majority of visitors were staying in only the one location. Only 34% of Skye and Lochalsh visitors were staying in the one location;

- The age profile of visitors to the Skye and Lochalsh area is relatively young compared with the profile of tourists visiting Scotland as a whole: 39% of visitors to the area were under 35 years, compared with around 30% of tourists to Scotland (UKTS and IPS estimates). There is also evidence from the survey that visitors to Skye and Lochalsh are slightly younger in profile than visitors to the Highlands as a whole;

- Visitors to Skye and Lochalsh are very upmarket and even more upmarket than visitors to the Highlands as a whole: over three quarters of visitors to the area were ABC1s (76%), compared to 70% of visitors to the region as a whole;

- Fewer than one in ten (9%) visitors to Skye and Lochalsh were visiting alone. Almost two thirds of visitors to the area were with one other person (65%), and around a quarter (26%) had three or more people in their party. The average party size amongst visitors to the area was **2.43 people**, a significantly lower proportion than in the Highlands as a whole (2.76 people);

- The lower average party size in Skye and Lochalsh compared to the Highlands as a whole, would appear to be a reflection of the larger proportion of visitors who did not have any children with them (88%, compared with 79% in the Highlands as a whole). The most common party composition in the area consisted of two adults and no children (64%);

- Around a fifth of visitors to Skye and Lochalsh were from Scotland (21%), whilst similar proportions were from elsewhere in the United Kingdom (39%), and from overseas (40%). In comparison with the Highlands overall, a significantly larger proportion of visitors to Skye and Lochalsh were from overseas (40% as opposed to 27%), emphasising the international appeal of the area;

- Most of the reasons for their visit provided by respondents in the Skye and Lochalsh area related to aspects of the Highland scenery. Whilst some described their prime motivation for visiting as having never been before or they had always wanted to visit, another large proportion were visiting because they had been before and knew the area;

- Two key influences on the decision to visit were provided by visitors to Skye and Lochalsh: a previous visit(s) to the area (43%), and advice from friends or relatives (42%). Guide books and tourist brochures were also important however, each of which were described as having had some influence on around 23% of trips to the Highlands;

- In total 23% of those interviewed in Skye and Lochalsh had been influenced to visit by tourist brochures, slightly higher than the average for the Highlands as a whole (15%);

- Typically, tourists in Skye and Lochalsh were staying away from home in Scotland for 10.1 nights, in the Highlands for 6.3 nights, and in Skye and Lochalsh for 3.1 nights;

- Just under half of the visitors to Skye and Lochalsh were on their first ever visit to the Highlands (45%), a significantly higher proportion than the average for the Highlands as a whole (35%). Almost two thirds of those interviewed in Skye and Lochalsh were on their first ever visit to the area (63%). Again, this is a significantly higher proportion of first-time visitors than the average across the Highlands (48%);

- Two thirds of those visitors interviewed in Skye and Lochalsh were also visiting the Lochaber area on their trip (67%), making this the most popular other area of the Highlands amongst visitors to this area. Also particularly popular were Inverness, Loch Ness and Nairn and Wester Ross, which were visited by 49% and 27% of Skye and Lochalsh visitors respectively;

- Amongst those interviewed in Skye and Lochalsh who were staying at least one night in the Highlands, more than four in five were staying locally for at least part of their trip (83%). Again, Lochaber (35%), Inverness, Loch Ness and Nairn (35%) and Wester Ross (16%) were the most popular other areas where visitors to this part of the Highlands chose to stay overnight;

- Just over half of the visitors to Skye and Lochalsh used their own car on their journey to the Highlands (52%). Around one in five (21%) used a rental car, whilst trains (10%), and coach tours (6%), were the only other forms of transport mentioned by more than 5% of respondents;

- Bed and breakfast establishments were the most popular forms of accommodation used by visitors to Skye and Lochalsh (40%). Hotels and motels were next most popular, stayed in by around a quarter of overnight visitors (24%), followed by self-catering in flats, houses and cottages (13%) and tents (13%). All other forms of accommodation were used by fewer than one visitor in ten. Satisfaction levels with their accommodation were generally fairly high amongst those visitors to Skye and Lochalsh who had stayed in commercial accommodation during their trip to the Highlands;

- Whilst around six in ten of those interviewed in the Skye and Lochalsh area indicated that they had taken part in some sporting/outdoor activities during their trip to the Highlands (59%), almost all of them had taken part in some non-sporting activities (99%). The most common sporting activity was *low level walking* of between two and eight miles distance. *General sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to Skye and Lochalsh, carried out by almost all visitors to the area (97%). Over half (56%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by four visitors in every ten (41%);

- Overall, only around six visitors in every ten to Skye and Lochalsh had visited at least one of the attractions in the area (59%). Most popular were the area's two most well known castles: Eilean Donan and Dunvegan, visited by 31% and 29% of visitors respectively. Around one visitor in five had visited the Clan Donald Centre on Sleat (21%), but no other attraction had been visited by more than 10% of visitors to the area;

- Over two thirds of those interviewed in Skye and Lochalsh had already visited a Tourist Information Centre (TIC) during their visit to the Highlands (69%). Amongst the 31% of visitors who had not visited a TIC on their trip, just under a fifth of them (18%) intended to visit one at some stage, whereas over three quarters (76%) had no intention of visiting a TIC. In total therefore, 74% of visitors had either already visited or intended to visit a TIC on their trip;

- 39% of visitors to the area claimed they had known a little about Skye and Lochalsh prior to their visit. On either side of this however, a slight majority claimed to have known even less than that (35%) than those who claimed to have known more than that about Skye (26%).

- Encouragingly, three visitors in every ten to the area described their visit as having been better than expected (30%). Although three in five felt it had been much as they had expected (60%), and 9% had not known what to expect, it is particularly encouraging that only 1% described their visit as having been worse than expected, thus indicating high degrees of satisfaction;

- Around two thirds of those interviewed in Skye and Lochalsh did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (65%). Amongst those who did think improvements could have been made, the range and variety of suggestions were very large: no single improvement was mentioned by more than 8% of visitors;

- Typically, respondents in Skye and Lochalsh spent £82 per day during their trip to the Highlands on themselves and others in their party, around £10 less than the average in the Highlands. This averaged out at a spend of £45 per person per day;

- Respondents in Skye and Lochalsh spent around £250 during their trip to the area on themselves and others in their party. This averaged out at a spend of just under £140 per person on their trip to the area. Given the average length of stay in the Highlands as a whole was 7 nights, the per trip expenditure was considerably higher (£301 per person);

- In terms of total trip spending per party in Skye and Lochalsh, the average spend was £340. The highest spenders by some margin were those staying in self-catering establishments (£750), followed by those who were basing themselves in the one location (£453). On the other hand, lowest spenders were those who were camping/caravanning (£254), those on touring holidays, staying in more than one location (£277), those staying in bed and breakfast establishments (£271), and overseas visitors (£283);

- Multivariate analysis of the Skye and Lochalsh datasets confirmed that the area was most popular amongst visitors from overseas without any dependent children – the two segments most likely to visit Skye and Lochalsh were made up of these types of visitors, with those on their first ever trip to the Highlands rather more likely to visit Skye than those on a repeat visit (65% and 56% above average respectively). Generally, Scots residents, particularly those with children, were least likely to visit Skye and Lochalsh.

A. Background and Methods

Background

With tourism accounting for around a fifth of the economy of the Highlands and Islands, the importance of this industry to the area is clear. Estimates from the United Kingdom Tourism Survey (UKTS) and the International Passenger Survey (IPS) suggest that in 1994, over 2.7 million tourist trips were made to the area by both UK and overseas tourists.

Highlands and Islands Enterprise (HIE) is responsible for both business development and tourism skills in the area, whilst the responsibility for marketing lies within the remit of the **Area Tourist Boards (ATBs)** and the **Scottish Tourist Board (STB).** The **local authorities** in the area also have an involvement in tourism, both in the provision of visitor attractions and events, but also through their economic development departments.

All of these agencies have a clear need for comprehensive information regarding the **volume, value, profile** and **characteristics** of visitors coming to the Highlands and Islands. In the past, there has been a reliance on the main national surveys (UKTS and IPS) for such data along with occasional and ad hoc visitor surveys in some parts of the Highlands and Islands. In some areas however, no real visitor research has been undertaken.

Consequently, during 1996, Highlands and Islands Enterprise commissioned System Three to conduct a **Visitor Survey Method Study** to recommend the most appropriate series of methods for conducting visitor surveys throughout the Highlands and Islands. These recommendations have subsequently been adopted by HIE when conducting visitor surveys.

Taking this work forward, **Highlands and Islands Enterprise** together with the **Highland Council** and **Highlands of Scotland Tourist Board** commissioned System Three to conduct a major visitor survey throughout the Scottish Highlands during March to November of 1997. This series of surveys covered all parts of the mainland, but did not include the Western or Northern Isles or the Argyll area.

The main **objectives** of this study were as follows:

- produce estimates of volume and value of visitors to the Highlands as a whole, and at the local level;
- supply information about the visitors and their visit to guide future tourism policy decisions;
- provide baseline information which can be updated in future studies.

This report covers the main findings to have emerged from the surveys undertaken in the **Skye and Lochalsh area**. Similar reports have been produced to cover the other parts of the Highlands, namely: Caithness, Sutherland, Ross and Cromarty, Moray, Badenoch and Strathspey, Inverness, Loch Ness and Nairn and Lochaber. In addition, a separate report has been produced covering the Highlands as a whole which provides a combination of the findings from each of the local areas.

Definition of Visitors

The survey covered all visitors to the Highlands on a holiday trip, those visiting friends and relatives on holiday, those staying away from home overnight on business, and people on a day trip from home. Residents of the Highlands on a leisure day out were also included within the sampling framework on the basis that they were interviewed at locations popular with day visitors and tourists alike (visitor attractions, scenic sites and town centres). A maximum quota was used to ensure that Highland residents did not dominate the sample, although in the event, this was not an issue.

Survey Method

The main survey method used throughout the study period was a programme of **face-to-face interviews** with a representative sample of visitors to the Highlands.

The efficacy of this methodology for visitor surveys is dependent on the careful selection of the **interview locations**. It was vital at the outset that the choice of sites reflected those locations in the Highlands most likely to be visited by visitors. It was important to ensure that the omission of one particular location(s) did not lead to the exclusion of a certain type of visitor from the sample. For the maximisation of the interviewer resources, it was also important that the sites chosen as interview locations were all capable of sustaining an adequate throughput of visitors on a daily basis.

In total, some 3,301 interviews were undertaken throughout the Highlands during the March to November period. Some 477 interviews were undertaken in the Skye and Lochalsh area, and the interview sites used are indicated below in Table A-1.

Table A-1- Interview locations: Skye and Lochalsh
Base: 477 interviews with visitors

	Interviews undertaken
Kyle of Lochalsh	100
Eilan Donan Castle	96
Portree Tourist Information Centre	95
Clan Donald Centre, Sleat	80
Broadford town centre	60
Dunvegan Castle	46
Total:	**477**

Each interview location was carefully chosen and a number of criteria were taken into account including:

- each offered a position which would intercept visitors as they leave a location and which would cause the minimum disruption to the throughput of visitors to the location
- where possible, there was a position which afforded the opportunity for the interviewer and respondent to sit down for the duration of the interview, and if possible, a position which provided some protection from the weather.

In some potential interview locations, such as town centre sites (e.g. Kyle of Lochalsh and Broadford), intercepting visitors as they passed a specified point replaced the requirement to make contact as they leave an interview location.

Respondents were selected on the basis of the **next person to leave**, or pass the interviewer on completion of the previous interview. Such an approach ensures the random selection of respondents whilst maximising the interviewer resource. In those situations where a family or group of people passed the interviewer together, the **"next birthday"** rule was applied to maintain this random selection procedure as it would be inappropriate for the oldest member of the party to always assume responsibility for the conduct of the interview.

The sample of **477 completed interviews** in the area represents a large and suitably robust sample for analysis of the characteristics of visits made to Skye and Lochalsh in 1997: at the 95% levels of confidence, results are accurate to plus or minus 4.5%. The interviews were conducted throughout the March to November period, taking account of the following factors:

- survey days were rotated across the various days of the week;
- survey days were rotated across the various weeks of the month;
- interviews were conducted at various times of the day between 10am and 8pm.

The daily and monthly breakdown of interviews undertaken in the Skye and Lochalsh area is indicated below:

Table A-2 - Day and Month of Interviews (%)
Base: 477 interviews with visitors to Skye and Lochalsh

	Interviews undertaken		**Interviews undertaken**
Monday	15	March/April	6
Tuesday	17	May	5
Wednesday	21	June	13
Thursday	7	July	23
Friday	11	August	24
Saturday	11	September	13
Sunday	18	October	10
		November	4
Total	**100**	**Total**	**100**

A large proportion of the interviews were conducted at the weekend (29%), reflecting the large number of visits made to tourist attractions and sites at that time of the week. Similarly, approaching half of the interviews were conducted during July and August (47%) to reflect the seasonal nature of tourism in the Highlands. Around a quarter of the interviews were undertaken during the March/April/May and October/November periods (25%) meaning that some seasonal analysis can be undertaken.

An interpretation and analysis of the full results and findings to emerge from the interviews in Skye and Lochalsh follows in Section B. Where appropriate, comparisons have been made with the overall findings for the Highlands as a whole. Multivariate analysis of the Skye and Lochalsh datasets was also undertaken in order to identify the key market segments for the area. The results of this exercise are described in Section C.

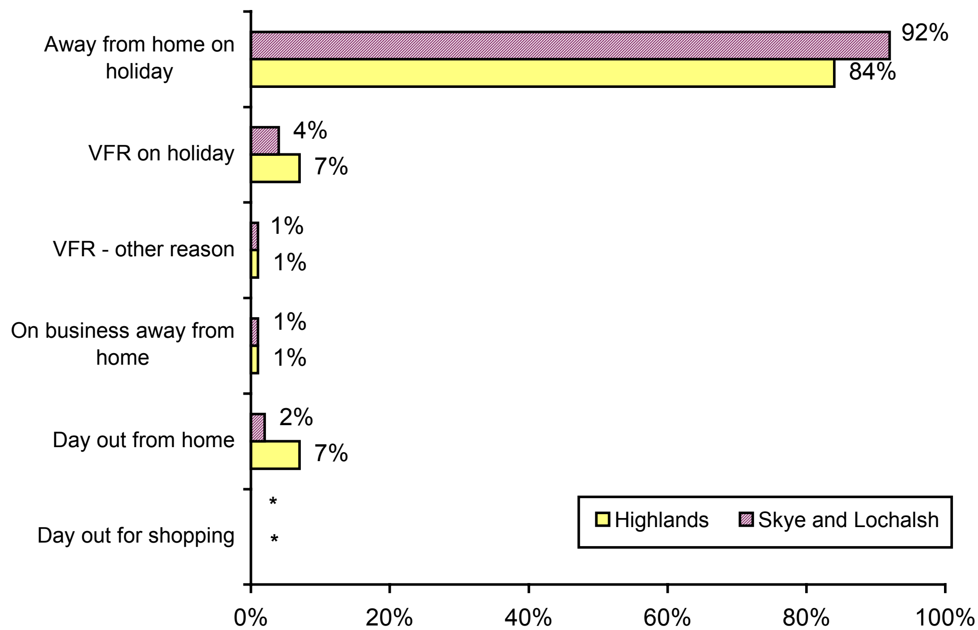
B. Main Findings

Reasons for Visiting

Purpose of Visit

The overwhelming majority of visitors to Skye and Lochalsh were staying away from home overnight (97%) - a slightly higher proportion to that recorded in the Highlands as a whole (93%). The main types of trips taken in the area, together with the comparable figures for the Highlands as a whole, are summarised in Figure B-1 below:

Figure B-1- Purpose of Visit: Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands



* - less than 0.5%

Over nine in ten visitors to Skye and Lochalsh were away from home on holiday (92%), a significantly larger proportion to that in the Highlands as a whole (84%). Whilst visiting friends and relatives on holiday accounted for 7% of visitors to the Highlands as a whole, this purpose was less common in Skye and Lochalsh, where only 4% of respondents were visiting friends and relatives on holiday. Similarly, day trippers from home were less prevalent in Skye and Lochalsh (2%) than in the Highlands generally (7%).

There were some variations in this purpose of trip profile to the Skye and Lochalsh area amongst the different market segments:

- a higher proportion of those aged over 55 years visiting the area were on holiday visiting friends and relatives (9%) than amongst those aged under 35 years (2%). Conversely, this younger age group were more likely to be on holiday (96%) than the over 55s (86%);
- those visitors to Skye and Lochalsh who were staying in the one location (a centred holiday) were more likely to be visiting friends and relatives (9%) than those who were staying in more than one location (1%). The vast majority of this latter group were on holiday (98%);
- likelihood to class their trip as a holiday tended to increase by length of stay: 90% of those on a 1-3 night break in the Highlands were on holiday, compared with 96% of those who were staying for 8 nights or more;
- Overseas visitors were particularly likely to be on holiday: 98% of them described their visit as a holiday compared with 79% of Scots. 10% of Scots were visiting friends and relatives whilst 7% were on a day trip from home;
- Those on a repeat visit were less likely to be on holiday (91%) than first time visitors to the Highlands, almost all of whom described their visit as a holiday (99%).

Type of Stay

Those respondents staying away from home were asked to indicate the extent to which their visit was touring in nature as opposed to a "centred" trip (see Table B-1 below):

Table B-1 - Type of Stay in the Highlands (%)
Base: 461 visitors to Skye and Lochalsh staying away from home; 2,936 visitors to the Highlands staying away from home

	Overnight visitors to Skye & Lochalsh	Overnight visitors to Highlands
- Staying in one main location in the Highlands and taking day trips from there	34	53
- Touring around, staying in 2 or 3 locations during visit to the Highlands	37	29
- Touring around the Highlands, staying in more than 3 locations	28	17
Total:	**100**	**100**

The majority of trips taken in the Highlands were not touring in nature: over half of those staying away from home were staying in one main location in the Highlands and taking day trips from there (53%). Around three in ten were staying in two or three locations in the Highlands (29%), whilst the remaining 17% were touring around, staying in more than three locations.

These figures are in stark contrast to the patterns evident in Skye and Lochalsh where the majority of visitors were on a touring holiday. Only around a third (34%) were staying in the one location, whilst the remaining two thirds were staying in two or more locations during their trip to the Highlands (65%). This illustrates the different product and appeal of Skye and Lochalsh evident from other surveys of visitors undertaken in the area before. This part of the Highlands and Islands is often seen as a short stay destination, part of a wider tour of other honeypot sites elsewhere in the Highlands and Scotland generally. The shorter length of stay patterns are confirmed later on in Table B-6.

There were some major variations in the types of trips taken by different market segments in the Skye and Lochalsh area:

- *Age:* those aged 55 years and over were more likely to be on a one centred holiday than those under the age of 35 years: 47% of those aged 55+ years were staying in the one location, compared with 22% of the younger age group. Conversely, the under 35s were more likely to be touring: 32% were staying in more than three locations compared to 24% of the over 55s;

- *Accommodation used:* those visitors who were staying in self-catering accommodation were much more likely to be based in the one location (77%). Conversely, those staying in bed and breakfast establishments and those who were caravanning/camping were much more likely to be on a touring holiday: 36% and 52% respectively were staying in more than three locations;

- *Origin:* Scots visitors (51%) and those from other parts of the UK (44%) were significantly more likely to be staying in only one location in the Highlands compared with only 18% of overseas visitors. Overseas visitors were therefore, considerably more likely to be touring - 39% stayed in two or three locations, and 41% stayed in even more than this;

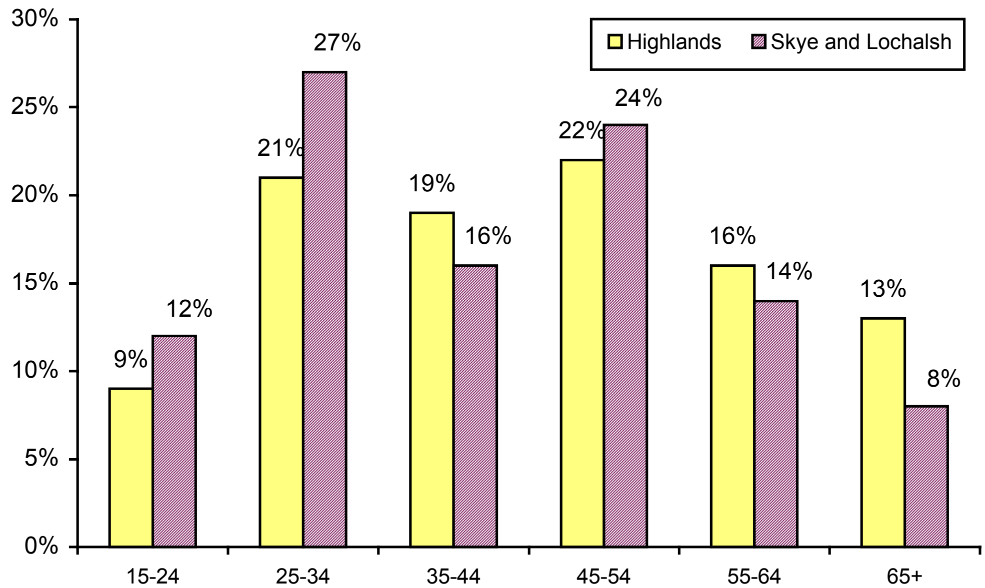
- *Length of Stay:* those staying in the Highlands for three nights or less were rather more likely to be staying in only one location (54%), than those who were in the Highlands for more than a week (20%). This latter group were more likely to be on a touring holiday than those staying for 1-3 nights - 61% and 3% respectively.

Visitor Profile

Age

The age groups of visitors to Skye and Lochalsh are indicated in Figure B-2 below:

Figure B-2 - Age of Visitors to Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands



The age profile of visitors to the Skye and Lochalsh area is relatively young compared with the profile of tourists visiting Scotland as a whole: 39% of visitors to the area were under 35 years, compared with around 30% of tourists to Scotland (UKTS and IPS estimates).

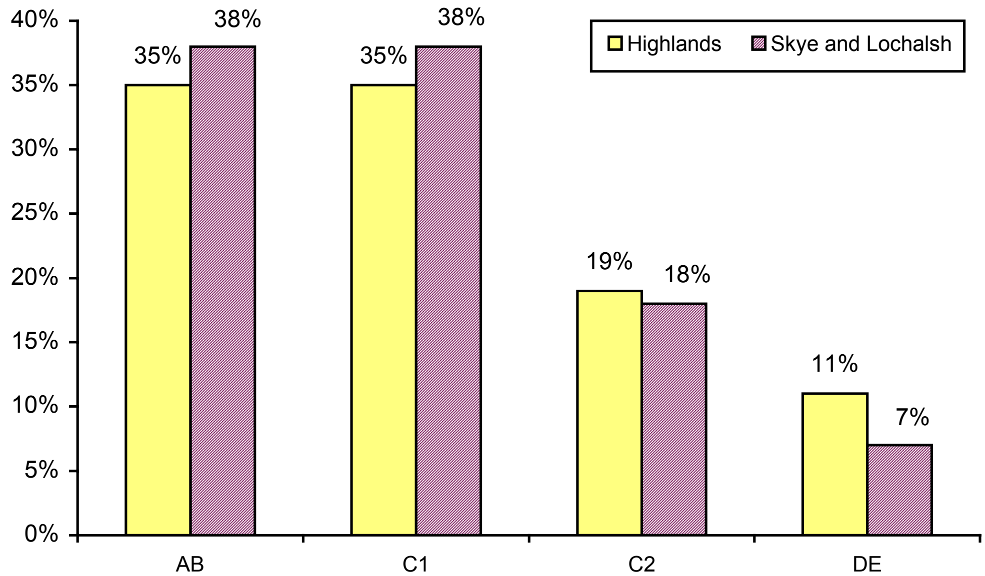
There is also evidence from the survey that visitors to Skye and Lochalsh are slightly younger in profile than visitors to the Highlands as a whole: around four in ten visitors were aged under 35 years (39%), compared with only 30% of visitors to the Highlands as a whole. Conversely, whilst three in ten visitors to the Highlands as a whole were aged 55+ years (29%), less than a quarter of visitors to Skye and Lochalsh were in this age grouping (22%).

There were some significant variations in the age profiles for different markets segments visiting Skye and Lochalsh:

- *Social Class:* ABC1s were more likely to be under the age of 35 (40%) than C2DEs (32%);
- *Type of trip:* a larger proportion of those on a touring trip to the Highlands were under 35 years (45%) than those staying in the one location (25%). Conversely, one centre holidays were rather more popular amongst those aged 55+ years (30%);
- *Accommodation:* visitors who were camping/caravanning or who were staying in bed and breakfast establishments tended to be younger than those staying in hotels (50%, 41% and 37% respectively, were aged under 35);
- *Origin:* overseas visitors tended to be younger than their UK counterparts: over half of those from overseas were aged under 35 years (52%) compared with 32% of Scots visitors and 28% of those from elsewhere in the UK;
- *Previous visits:* those on their first ever trip to the Highlands were more likely to be under the age of 35 years than those who had been before (51% and 29% respectively).

Social Class

Figure B-3 - Social Class of visitors to Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands



A definition of social class categories is contained in Appendix 1.

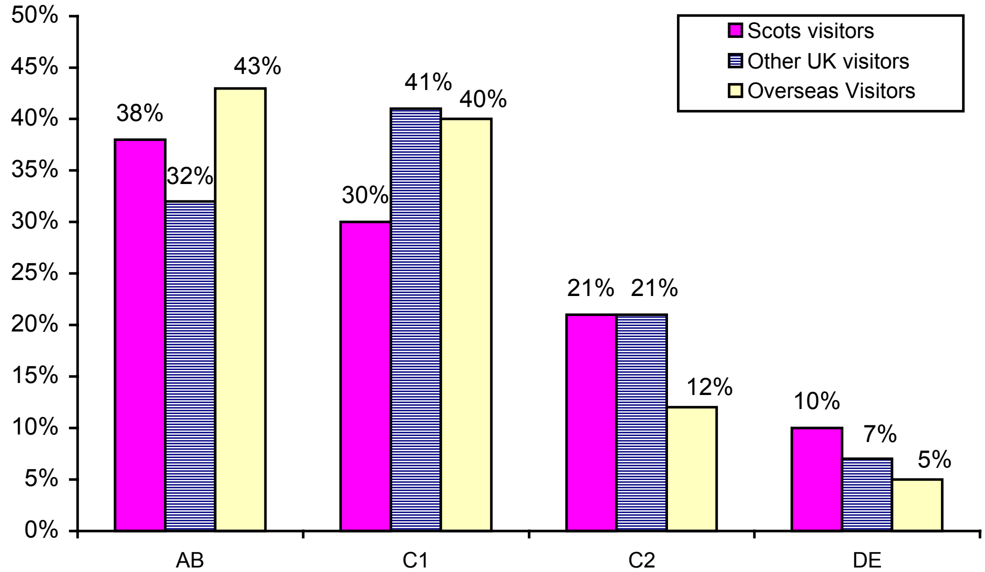
As with visitors to the Highlands as a whole, those visiting Skye and Lochalsh are very upmarket in their profile, indeed there is evidence to suggest that their profile is even more upmarket than the average: over three quarters of visitors to the area were ABC1s (76%), compared to 70% of visitors to the region as a whole. Much of this difference can be explained by the higher proportion of overseas visitors to Skye and Lochalsh (see Table B-3), as visitors from outside the UK are more likely to fall into the ABC1 socio-economic groupings. No information is available on the social class of overseas visitors to Scotland from the International Passenger Survey, however the social class of UK visitors to the Skye and Lochalsh area is fairly similar to that for Scotland as a whole (from the United Kingdom Tourism Survey).

Those categories of visitors **more likely to be ABC1s** in Skye and Lochalsh included those visitors aged 55 and over (80%) and visitors from overseas (83%). Conversely, those aged 35-54 years (30%) and Scots and other UK visitors (31% and 28% respectively) were **more likely to be C2DEs**.

The social class breakdown varied to a certain extent by origin of visitors, with overseas visitors to the area considerably more likely to be ABC1s than visitors from Scotland or other parts of the UK:

Figure B-4 - Social Class of visitors by region of origin

Base: 477 visitors to Skye and Lochalsh;



Party size and composition

Fewer than one in ten (9%) visitors to Skye and Lochalsh were visiting alone. Almost two thirds of visitors to the area were with one other person (65%), and around a quarter (26%) had three or more people in their party. The average party size amongst visitors to the area was **2.43 people**, a significantly lower proportion than in the Highlands as a whole (2.76 people).

Visitors aged 35-44 years had slightly larger party sizes (2.52 people), probably a reflection of there being more family groups within this age category, as were C2DEs (2.52), those staying in the one location (2.78), and those staying in self-catering accommodation (3.26). Those on a touring holiday were in smaller parties (2.2 people) as were those staying in hotels and guesthouses (2.19).

The composition of these groups is illustrated below:

Table B-2 - Party Composition in Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands

	Skye & Lochalsh	Highlands
Adults, no children under 18 years	**88**	**79**
- one adult, no children under 18 years	9	7
- two adults, no children under 18 years	64	56
- more than two adults, no children under 18 years	15	16
Adults with children under 18 years	**12**	**21**
Total:	**100**	**100**

The lower average party size in Skye and Lochalsh compared to the Highlands as a whole, would appear to be a reflection of the larger proportion of visitors who did not have any children with them (88%, compared with 79% in the Highlands as a whole). The most common party composition in the area consisted of two adults and no children (64%).

As would be expected, a larger proportion of those aged 35-54 years had children with them (18%) than amongst those aged under 35 (9%) and those aged 55+ years (4%). Others more likely to have children with them included those on a centred holiday (19%), and visitors who were self-catering (31%). Visitors to the Skye and Lochalsh from overseas were rather less likely to have children with them (7%) than visitors from other parts of the UK (13%) or from Scotland (20%).

Origin of Visitors

The origin of visitors to Skye and Lochalsh is indicated in Table B-3 below:

Table B-3 - Origin of Visitors to Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands

	Skye and Lochalsh		Highlands	
	All visitors	**Holiday visitors**	**All visitors**	**Holiday visitors**
Scotland	**21**	**18**	**32**	**26**
- Glasgow and Clyde Valley	5	4	7	7
- Aberdeen & Grampian	3	3	6	4
- Edinburgh & Lothian	2	3	5	5
- Tayside	2	2	2	1
- Other Scotland	9	6	12	9
England	**38**	**38**	**39**	**42**
- South East	13	13	13	14
- North	10	9	9	10
- Midlands	7	7	7	8
- North West	5	6	6	7
- South West	4	3	3	3
Other UK	**1**	**1**	**2**	**2**
Overseas	**40**	**43**	**27**	**30**
- USA	8	9	5	6
- Germany	8	8	5	6
- Australia	5	6	3	3
- Netherlands	3	3	2	2
- Canada	3	3	2	2
- France	3	3	2	2
- Other overseas	10	11	8	9
Total:	**100**	**100**	**100**	**100**

Around a fifth of visitors to Skye and Lochalsh were from Scotland (21%), whilst similar proportions were from elsewhere in the United Kingdom (39%), and from overseas (40%). In comparison with the Highlands overall, a significantly larger proportion of visitors to Skye and Lochalsh were from overseas (40% as opposed to 27%), emphasising the international appeal of the area.

When overnight holiday visitors are analysed separately, as would be expected, the proportion of overseas visitors increases even further, with 43% of holiday visitors coming from overseas countries of origin.

In terms of individual countries of origin, the United States of America and Germany were the two key overseas markets for this area, with 9% and 8% respectively of holiday visitors coming from these countries. European countries accounted for 23% of visitors to Skye and Lochalsh, whilst other parts of the world made up 20% of visitors. The main population centre of The South East of England was the biggest regional market for the area, 13% of visitors coming from there. Combined, the North and North West of England were also particularly important, accounting for 15% of visitors. Although a significantly less important market to Skye and Lochalsh than to the Highlands generally, Scotland accounted for 21% of visits, with the three main cities accounting for the largest proportion of visitors: 5%, 3% and 2% of visitors respectively were from the Glasgow, Aberdeen and Edinburgh areas.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of visitors to Skye and Lochalsh with the typical origin profile for Scotland as a whole (from UKTS and IPS). Typically, English residents account for around 40% of holidays in Scotland, a similar proportion are Scots, 3% are from Wales and Northern Ireland, and the remaining 15% are from overseas. Although it must be borne in mind that the Highland Visitors Survey only covered the late-March to November period as opposed to the full-year coverage of IPS and UKTS, it is very clear that the Skye and Lochalsh area attracted a significantly larger share of overseas visitors and a correspondingly smaller proportion of Scots visitors than the national average.

Motivations for visiting

Main reasons for visiting the Highlands

Respondents were asked to indicate what their main reasons had been for visiting the Highlands. Asked in an open-ended format, this question resulted in a wide variety of answers, and those mentioned by 5% or more Skye and Lochalsh respondents are outlined in Table B-4 below:

Table B-4 - Main reasons for visiting the Highlands (%)
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands

	Skye & Lochalsh	Highlands
Scenery/scenic views/beauty/unspoilt	18	22
Never been before/always wanted to come	17	14
Been before/know area	12	18
Mountains and hills/landscape	10	12
Family/friends/connections in the area	10	12
Peace and quiet/tranquillity/relaxing/remote	9	13
Like area/enjoy it	9	12
General sightseeing/day out	6	13
House here/time-share	6	6
Ancestral ties/genealogy/family tree	5	2
Total:	**100**	**100**

As would be expected, many of the reasons for their visit provided by respondents in the Skye and Lochalsh area related to aspects of the Highland scenery. Whilst some described their prime motivation for visiting as having never been before or they had always wanted to visit, another large proportion were visiting because they had been before and knew the area.

There are close similarities in the reasons for their visit provided by visitors to Skye and Lochalsh to those for the Highlands as a whole. However a slightly larger proportion of visitors to this area would appear to have been attracted to visit having never been before (17% and 14% respectively) as opposed to those whose main reason for visiting was they had been previously (12% in Skye and Lochalsh, 18% in the Highlands generally). Also, the scenery would appear to have been slightly more important amongst visitors to the Highlands generally (22%) than amongst those interviewed in Skye and Lochalsh specifically (18%).

Peace and quiet (9%) and general sightseeing (6%) were also less common reasons given amongst visitors to Skye and Lochalsh than in the Highlands as a whole (13% and 13%).

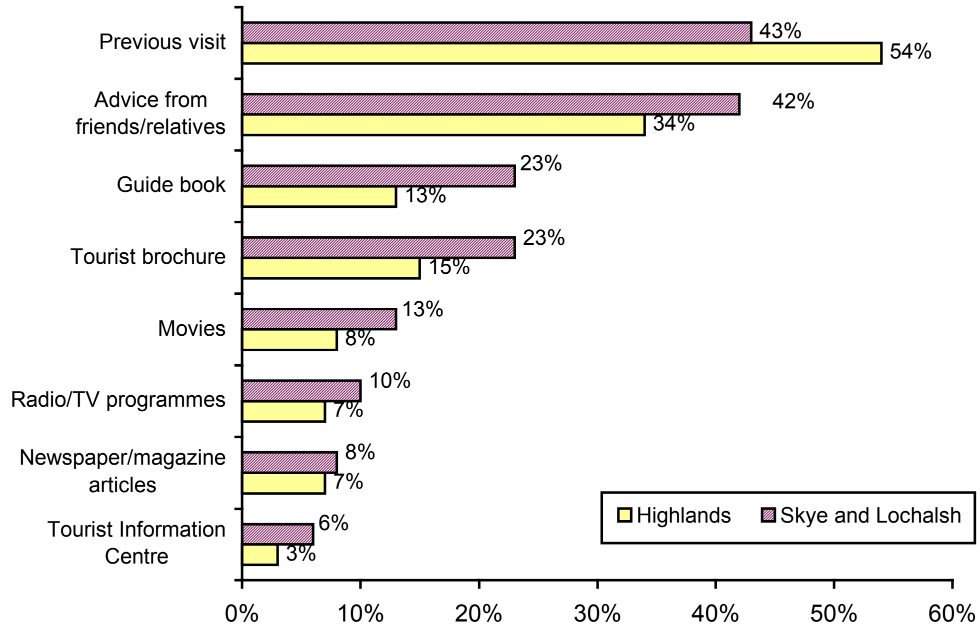
As would be expected, there were variations in the motivations for visiting amongst the key market sectors visiting Skye and Lochalsh:

- *Scenery/scenic views/beauty/unspoilt (18% overall):* more important amongst overseas visitors (22%) and amongst those aged under 35 years (21%);
- *Never been before/always wanted to come (17% overall):* more important amongst those on their first ever trip to the Highlands (30%) and amongst those from England, Wales and Northern Ireland (20%);
- *Been before, know the area (12% overall):* more important amongst those aged over 35 years (16%) than amongst younger visitors (5%). Also, more of an influence amongst those staying in the one location (17%), and amongst those who were on a return trip (20%);
- *Mountains and hills/landscape (10% overall):* more important amongst those aged under 35 years (16%), those on a touring holiday (17%), those staying for more than a week (18%) and amongst overseas visitors (16%).

Marketing Influences

In an attempt to ascertain the relative influences of different marketing activities, respondents were provided with a list of items and asked if any of them had influenced their decision to visit the Highlands (see Figure B-5):

Figure B-5 - Influences on the decision to visit the Highlands (%)
Base: 477 visitors to Skye and Lochalsh;
3,301 visitors to the Highlands



Two key influences emerged amongst visitors to Skye and Lochalsh: a previous visit(s) to the area (43%), and advice from friends or relatives (42%). Guide books and tourist brochures were also important however, each of which were described as having had some influence on around 23% of trips to the Highlands.

All other influences were mentioned by no more than one in eight respondents however, and the dominance of previous visits and advice indicates the important role played by "informal" information sources in influencing visits.

In terms of influences on their visit, there were a number of differences between those interviewed in the Skye and Lochalsh area and those interviewed throughout the Highlands. Visitors to Skye and Lochalsh would appear to have been influenced more by advice from friends and relatives (42%) and by brochures (23%) or guidebooks (23%) than visitors to the Highlands as a whole (34%, 15% and 13% respectively). The higher proportions of overseas visitors to the area would certainly help to explain the greater role played by guidebooks and brochures (see below): other surveys have traditionally indicated that overseas visitors are significantly more likely to use these types of information sources than their British counterparts.

As was suggested in the analysis of the main reason for visiting, a smaller proportion of visitors interviewed in Skye and Lochalsh were influenced by a previous visit (43%) than generally (54%), suggesting a larger proportion of first time visitors to the area. This is confirmed in Figure B-6 on page 23.

There are some interesting variations in the influences on the trip amongst Scots, other UK and overseas visitors. The top five influencing factors for each of these markets is indicated below:

Scots visitors:

Previous visit	- 53%
Advice - friends/relatives	- 23%
Tourist Brochure(s)	- 18%
Radio/TV programme	- 9%
Tourist Information Centre	- 7%

Other UK visitors:

Previous visit	- 57%
Advice - friends/relatives	- 38%
Tourist Brochure(s)	- 20%
Guide book	- 15%
Radio/TV programme	- 10%

Overseas visitors:

Advice - friends/relatives	- 55%
Guide book	- 40%
Tourist brochure	- 28%
Movies/films	- 25%
Previous visit	- 25%

Clearly, amongst Scots visiting Skye and Lochalsh, although relatively less important than in the Highlands as a whole, previous visits to the Highlands were the major influence on their decision to visit this time. Advice from friends and relatives was also important however, mentioned by around one in four of them (23%). Visitors from other parts of the UK were slightly more likely to have been before, but advice from others was significantly more important than amongst Scots (38% and 23% respectively). For overseas visitors, advice from friends and relatives was the main influencing factor on their decision to visit, although, as indicated above, four in ten decided to visit having read guidebooks (40%).

Use of tourist brochures

In total 23% of those interviewed in Skye and Lochalsh had been influenced to visit by tourist brochures, slightly higher than the average for the Highlands as a whole (15%). Tourist brochures were more influential in some markets than others: 29% of those on their first ever trip to the Highlands had been influenced by a tourist brochure as opposed to 19% of those who had been before. Also, whilst they influenced 18% of the trips by Scots residents, 20% and 28% of other UK and overseas visitors respectively had been influenced by brochures.

These respondents who had been influenced by brochures were then shown the front covers of several tourist brochures produced by the Scottish Tourist Board and Highlands of Scotland Tourist Board, and asked whether any of them had influenced their visit (see Table B-5 below):

Table B-5 - Brochures which had influenced the visit (%)
Base: 109 respondents in Skye and Lochalsh, influenced by brochure(s)
507 respondents in the Highlands, influenced by brochure(s)

	Skye & Lochalsh	Highlands
Freedom of the Highlands (HOST)	13	32
Scotland - Main UK Guide (STB)	14	31
Scotland - Overseas Guide (STB)	9	31
6 Local Accommodation/ Visitor Guides (HOST)	6	14
None of these	72	39
Total:	**100**	**100**

The results amongst the sample of visitors interviewed in Skye and Lochalsh are very different from those apparent for the Highlands as a whole. Significantly smaller proportions of visitors to the area who had been influenced by tourist brochures would appear to have been talking about one of the main HOST or STB brochures: 28% claimed to have seen some of these brochures before, compared with 61% in the Highlands as a whole. Almost three quarters of them had not used any of these brochures (72%) and were clearly talking about other, commercial brochures (e.g. coach tours, tour operators, or perhaps a brochure produced by other agencies such as the British Tourist Authority).

Length of Stay

Those respondents staying away from home were asked to indicate how many nights they would be away from home in Scotland, how many nights in the Highlands, and how many nights in Skye and Lochalsh:

Table B-6 - Length of Stay (%)
Base: 468 respondents in Skye and Lochalsh staying away from home
3,080 respondents in the Highlands staying away from home

	Skye and Lochalsh			Highlands		
	In Scotland	**In the Highlands**	**In the area**	**In Scotland**	**In the Highlands**	**In the area**
None	-	1	15	-	5	22
One	1	5	21	2	4	14
Two	4	8	18	5	9	16
Three	7	13	16	7	10	11
Four	6	12	8	7	9	7
Five	6	10	4	5	8	5
Six	6	7	4	7	8	4
Seven	19	17	7	19	19	11
Eight - Thirteen	23	16	3	20	15	4
Fourteen	12	5	2	15	8	4
Fifteen or more	15	3	1	14	5	2
Total:	**100**	**100**	**100**	**100**	**100**	**100**
Average	**10.1 nights**	**6.3 nights**	**3.1 nights**	**10.0 nights**	**7.0 nights**	**3.9 nights**

Typically, tourists in Skye and Lochalsh were staying away from home in Scotland for 10.1 nights, in the Highlands for 6.3 nights, and in Skye and Lochalsh for 3.1 nights. Whilst the overall length of stay in Scotland amongst visitors to Skye and Lochalsh was very similar to the average for the Highlands as a whole (10.0 nights), the trip lengths in the Highlands and in the area were slightly shorter than the average for tourists in the Highlands as a whole (7.0 and 3.9 nights respectively). Conversely, 85% of those tourists interviewed in Skye and Lochaber were staying overnight in the area - a slightly larger proportion than the average across the other areas of the Highlands where 78% of tourists were staying overnight locally. Visitors staying overnight in Skye and Lochalsh were more likely to be staying for only one night however (21%).

Length of stay in Skye and Lochaber varied amongst the different types of visitor:

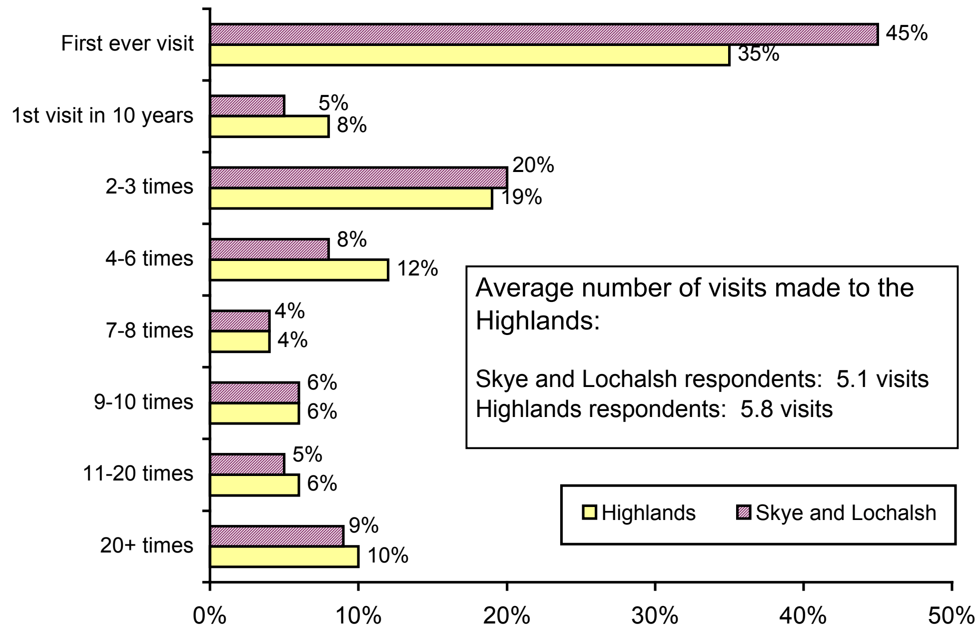
- Older visitors stayed for a longer period than younger visitors: the average durations of stay amongst the over 55s in Skye and Lochalsh was 3.2 nights. The comparable length of stay for those under 35 years was 2.9 nights;
- C2DEs stayed longer (3.5 nights) than ABC1s (2.9 nights);
- Those respondents touring around and staying in more than three locations stayed for around 3 nights in Skye and Lochalsh. Surprisingly, those staying in the one location only stayed slightly longer: 3.8 nights;
- Visitors who were self-catering and who were camping and caravanning stayed longer (5.9 nights and 3.6 nights respectively) than those staying in hotels and guesthouses or bed and breakfast establishments (2.2 and 2.3 nights respectively);
- Length of stay in Skye and Lochalsh varied slightly by origin: overseas visitors were typically spending 2.5 nights in the area, compared with 3.3 nights for visitors from other parts of the UK, and 3.4 nights amongst Scots;
- First time visitors to the Highlands tended to stay for a slightly shorter period in Skye and Lochalsh than those who had been before (2.4 and 3.7 nights respectively).

Previous Visits

Previous visits to the Highlands

Respondents' previous experience of the Scottish Highlands is indicated in Figure B-6 below:

Figure B-6 - Number of visits to the Highlands (including this one)
Base: 462 non-Highland residents interviewed in Skye and Lochalsh
3,120 non-Highland residents in the Highlands



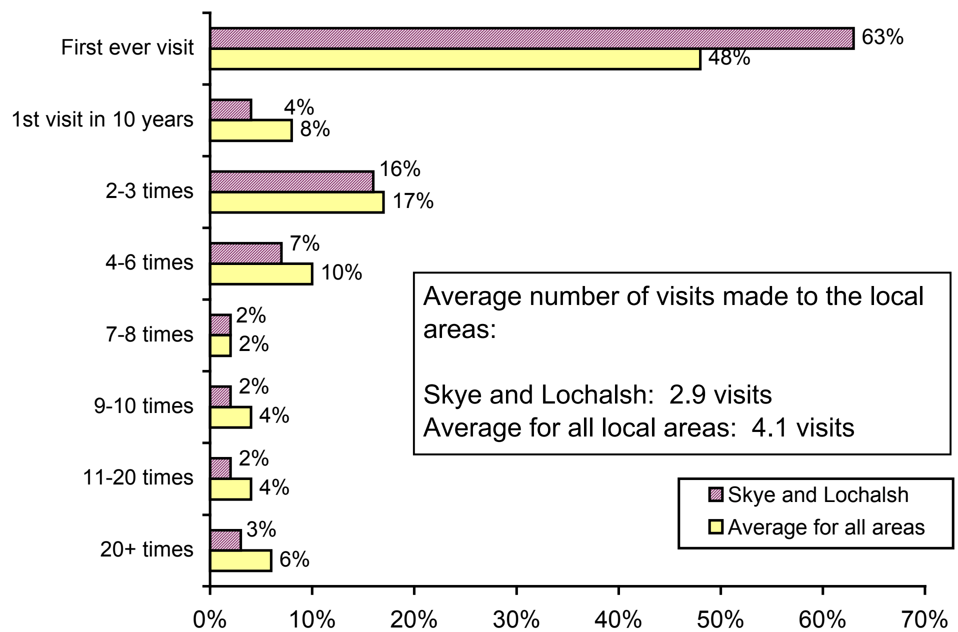
Just under half of the visitors to Skye and Lochalsh were on their first ever visit to the Highlands (45%), a significantly higher proportion than the average for the Highlands as a whole (35%). Similar results were obtained in Inverness, Loch Ness and Nairn and this again suggests that this area represents one of the first parts of the Highlands that a "new" tourist is likely to visit. There are however a large number of loyal, repeat visitors who have made many trips to the Highlands before: almost one third of those interviewed had been in the Highlands four or more times previously (32%).

As would be expected, those aged 55+ years were more likely to have been to the Highlands before than those aged under 35 years (68% and 41% respectively were on repeat trips). C2DEs (62%) were also rather more likely to have been before than ABC1s (53%), whilst those on a centred break were significantly more likely to have been before (67%) than those on a touring holiday (46%).

Again, as would be expected, the incidence of previous trips to the Highlands decreased with distance: 73% of overseas visitors interviewed in Skye and Lochalsh were on their first ever trip to the Highlands compared to 30% of visitors from England, Wales and Northern Ireland and only 11% of Scots.

Previous visits to Skye and Lochalsh

Figure B-7 - Number of visits to Skye and Lochalsh (including this one)
Base: 462 non-Highland residents in Skye and Lochalsh
3,120 non-Highland residents in the Highlands



Almost two thirds of those interviewed in Skye and Lochalsh were on their first ever visit to the area (63%). Again, this is a significantly higher proportion of first-time visitors than the average across the Highlands (48%).

Again, those aged 55+ years were more likely to have been to Skye and Lochalsh before than those aged under 35 years (50% and 22% respectively were on repeat trips), whilst C2DEs (48%) were also rather more likely to have been before than ABC1s (33%). Also, those on a centred break were more likely to have been to the area before (47%) than those on a touring holiday (29%).

86% of overseas visitors interviewed in the Skye and Lochalsh area were on their first ever trip to the area compared to 51% of visitors from other parts of the United Kingdom and 38% of Scots visitors.

Visits to other parts of the Highlands

Visitors were asked to indicate which other parts of the Highlands they would be visiting on their trip, and in which areas they would be staying overnight (see Table B-7) below:

Table B-7 - Areas Visited/Stayed in by visitors to Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh;
461 visitors to Skye and Lochalsh, staying overnight in Highlands

	Areas visited	Areas Stayed in
Skye and Lochalsh	100	83
Lochaber	67	35
Inverness, Loch Ness and Nairn	49	35
Wester Ross	27	16
Sutherland	11	7
Easter Ross	9	5
Moray	8	4
Badenoch and Strathspey	7	3
Caithness	7	5
Orkney	1	1
Western Isles	1	*
Total:	**100**	**100**

Note - (*) - less than 0.5%

Two thirds of those visitors interviewed in Skye and Lochalsh were also visiting the Lochaber area on their trip (67%), making this the most popular other area of the Highlands amongst visitors to this area. Also particularly popular were Inverness, Loch Ness and Nairn and Wester Ross, which were visited by 49% and 27% of Skye and Lochalsh visitors respectively. Not surprisingly, those areas furthest from Skye, Moray, Badenoch and Strathspey and Caithness, were the least likely mainland parts of the Highlands to be visited on this trip by those in the area (8%, 7% and 7% respectively). Only a very small proportion of visitors intended travelling to either the Western Isles or Northern Isles on this visit (1% and 2% respectively).

Amongst those interviewed in Skye and Lochalsh who were staying at least one night in the Highlands, more than four in five were staying locally for at least part of their trip (83%). Again, Lochaber (35%), Inverness, Loch Ness and Nairn (35%) and Wester Ross (16%) were the most popular other areas where visitors to this part of the Highlands chose to stay overnight.

Some market segments were more likely than others to be staying overnight in Skye and Lochalsh:

- those aged under 35 years (86%)
- those on a touring holiday (90%)
- those staying in bed and breakfast establishments (90%) and in caravans/camping (90%)
- Scots visitors (88%)

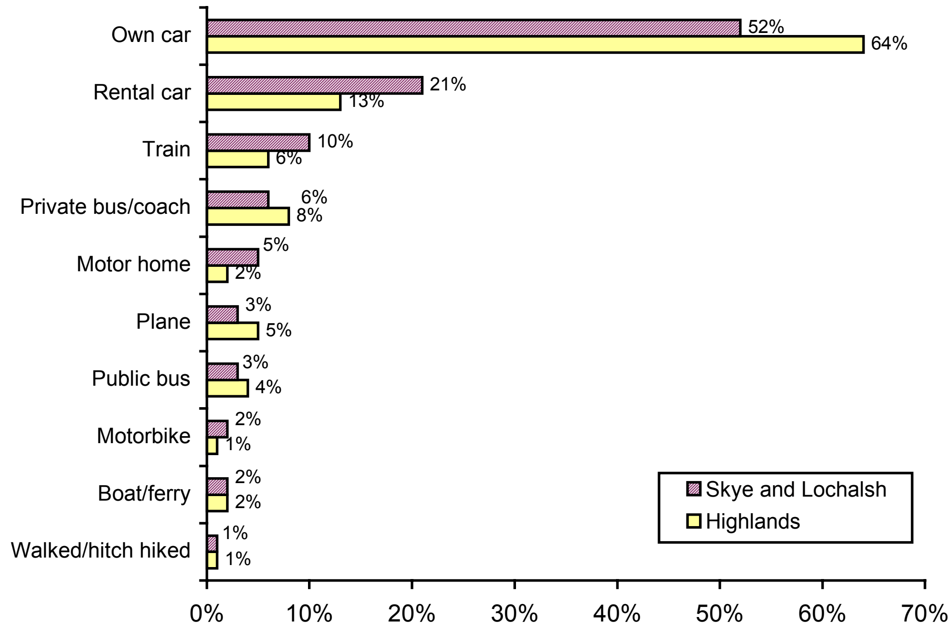
As would be expected, those visitors on a touring holiday were considerably more likely to be both visiting and staying in other parts of the Highlands than those on a centred holiday.

Transport Used

Respondents were asked what forms of transport they had used on their **journey to the Highlands**:

Figure B-8 - Forms of Transport used to get to the Highlands

Base: 462 visitors to Skye and Lochalsh, non-resident in the Highlands
3,120 visitors to the Highlands



Just over half of the visitors to Skye and Lochalsh used their own car on their journey to the Highlands (52%). Around one in five (21%) used a rental car, whilst trains (10%), and coach tours (6%), were the only other forms of transport mentioned by more than 5% of respondents.

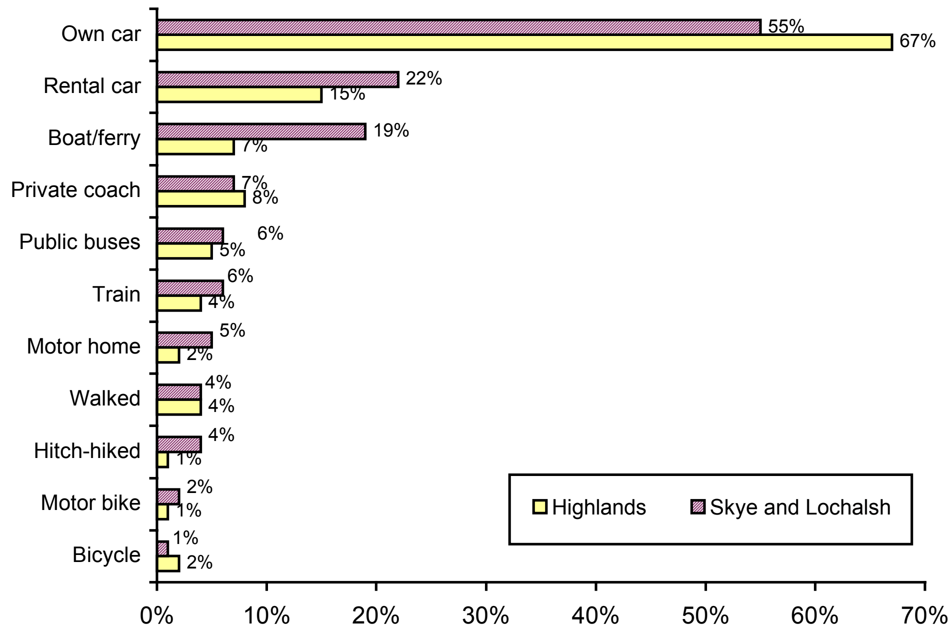
Despite the fact it is the dominant means of arriving in the Highlands, it would appear that visitors to Skye and Lochalsh are rather less likely than the Highland average to use their own car (64% in the Highlands as a whole). They are correspondingly more likely to use a rental car and slightly more likely to arrive by train.

There are some variations in the forms of transport used amongst some of the key market segments:

- Under 35s: more likely to use rental cars (25%), trains (16%) and public buses (6%);
- Over 55s: more likely to be on a private coach tour (10%);
- ABC1s: more likely to arrive by hire car (23%);
- C2DEs: more likely to use their own car to get there (60%);
- Touring holidays: more likely to arrive by rental car (26%) or in motor homes (12%);
- Those based in one location: more likely to use their own car to get there (68%);
- Scots visitors: most likely to arrive with their own car (85%);
- Overseas visitors: more likely to use rental cars on their journey to the Highlands (43%);
- First time visitors: more likely to use rental cars (32%);
- Repeat visitors: more likely to arrive in their own car (64%).

The types of transport used by visitors **whilst in the Highlands** is indicated in Figure B-9 below:

Figure B-9 - Forms of Transport used whilst in the Highlands
Base: 477 visitors to Skye and Lochalsh
3,301 visitors to the Highlands



Just over half of the visitors to Skye and Lochalsh used their own car to travel around the Highlands (55%), making this the main form of transport used during their visit. Just under a quarter (22%) hired a car, whilst reflecting the Skye's island status, around a fifth (19%) used ferries whilst in the area. All other forms of transport were used by less than 10% of visitors to the Highlands.

Compared with the Highlands as a whole, slightly larger proportions of visitors to Skye and Lochalsh used hire cars, and significantly higher proportions used boats/ferry services. Smaller proportions used their own car.

Accommodation

Accommodation used in the Highlands

Those respondents who were staying overnight in the Highlands were asked what types of accommodation they were using during their visit:

Table B-8 - Accommodation used in the Highlands (%)
Base: 461 visitors to Skye and Lochalsh, staying overnight in Highlands
2,936 visitors to the Highlands staying overnight in the Highlands

	Skye & Lochalsh	Highlands
Bed and Breakfast	40	28
Hotel/motel	24	25
Rented house/flat/cottage	13	15
Tent	13	11
Youth Hostel	9	6
Staying with friends and relatives	5	9
Motor caravan/camper van	5	2
Guest house	5	5
Touring caravan	2	5
Static caravan - rented	1	1
Other hostel/bunkhouse	1	1
Total:	**100**	**100**

Bed and breakfast establishments were the most popular forms of accommodation used by visitors to Skye and Lochalsh (40%). Hotels and motels were next most popular, stayed in by around a quarter of overnight visitors (24%), followed by self-catering in flats, houses and cottages (13%) and tents (13%). All other forms of accommodation were used by fewer than one visitor in ten.

When compared with the Highlands as a whole, visitors to Skye and Lochalsh were rather more likely to be staying in bed and breakfast establishments, tents, youth hostels, and motor caravans, but rather less likely to stay with friends and relatives or in touring caravans.

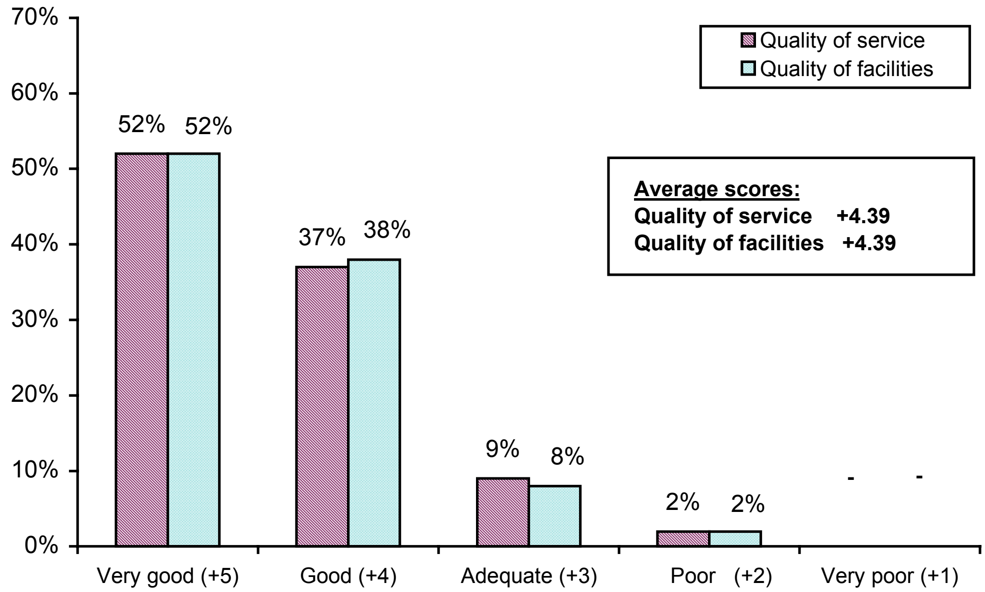
There were some notable differences in the types of accommodation used amongst the different market segments visiting Skye and Lochalsh:

- Visitors aged under 35 years: more likely to stay in bed and breakfast establishments (43%), tents (24%) or youth hostels (16%), and less likely to stay in hotels/motels (17%) or in self-catering accommodation (7%);
- Visitors aged 55+ years: more likely to stay in hotels (33%), or with friends and relatives (9%), but less likely to stay in tents (2%) or in youth hostels (1%);
- Type of trip: those on a touring trip were more likely to be staying in bed and breakfast establishments (51%), tents (23%), motor caravans (13%) or in youth hostels (15%) than those staying in the one location (21%, 4%, less than 1% and 2% respectively). Conversely, tourers were less likely to stay in self-catering accommodation (2%) or with friends and relatives (2%) than those staying in the one location (30%, and 11% respectively);
- Origin: over half of the overseas visitors stayed in bed and breakfast establishments (57%), compared to 26% of those from elsewhere in the UK and 33% of Scots. Overseas visitors were also more likely to stay in youth hostels (14%). Self catering accommodation was more popular amongst visitors from elsewhere in the UK (24%) than amongst overseas visitors (4%);
- Length of Stay: bed and breakfast establishments (47%) and hotels/motels (34%) were rather more popular forms of accommodation on 1-3 night breaks in the Highlands than on breaks of 8 or more nights (38% and 16% respectively).

Levels of satisfaction with accommodation

Those people interviewed in Skye and Lochalsh who had stayed overnight in commercial accommodation during their trip to the Highlands, were asked to rate the quality of service and the quality of facilities experienced:

Figure B-10 - Rating of accommodation used by visitors to Skye and Lochalsh (%)
Base: 399 visitors to Skye and Lochalsh staying in commercial accommodation



Note: (-) - nil respondents

Satisfaction levels with their accommodation were generally fairly high amongst those visitors to Skye and Lochalsh who had stayed in commercial accommodation during their trip to the Highlands. Just over half (52%) described the quality of service as "very good", whilst a further 37% described it as "good". 9% felt the service had only been adequate, whilst 2% of respondents (N=6) felt it had been "poor" . No respondents described the quality of service as being "very poor". Satisfaction levels with the facilities experienced in accommodation were almost identical.

By applying "scores" from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland accommodation. Overall, the quality of service and quality of facilities in accommodation achieved identical scores of +4.39.

In both cases, satisfaction levels were generally higher amongst those aged 55+ years, and amongst those staying in the one location. Slightly lower levels of satisfaction were apparent amongst overseas visitors, a feature which has been evident in other visitor surveys within Scotland, and indeed, elsewhere in the UK.

Activities Undertaken

Visitors were provided with a list of activities and asked to indicate which of them, if any, they had undertaken during their trip, and which they would describe as their main activity. Those activities undertaken by more than 2% of respondents interviewed in Skye and Lochalsh are summarised in Table B-9:

Table B-9 - Activities undertaken in the Highlands (%)
Base: 477 visitors to Skye and Lochalsh
3,301 visitors to the Highlands

	Activities undertaken		Main activity	
	Skye & Lochalsh	**Highlands area**	**Skye & Lochalsh**	**Highlands area**
Any Sporting activities	**59**	**59**	**8**	**17**
Low level walking of 2-8 miles	47	47	4	8
Cycling/mountain biking	9	8	1	1
Hill walking/low level walks	8	11	*	3
>8mi	8	4	2	1
Mountaineering/rock climbing	3	3	*	*
Horse riding/pony trekking	3	5	*	1
Game Fishing	3	6	*	1
Golf	**41**	**41**	**92**	**83**
No sporting activities				
	99	**98**	**92**	**82**
Any non-sporting activities	97	91	90	75
General sightseeing/touring	56	58	*	2
Shopping	41	42	*	1
Museum/art gallery/heritage cen.	21	25	*	1
Wildlife attraction	18	17	*	*
Archaeological site	10	11	*	*
Concert/ceilidh/theatre/cinema	8	14	*	*
Leisure centre/swimming pool	7	5	-	*
Other cultural event	3	2	-	*
Family tree/genealogy research	**1**	**2**	**8**	**18**
No non-sporting activities	**100**	**100**	**100**	**100**
Total:				

* - less than 0.5%

Whilst around six in ten of those interviewed in the Skye and Lochalsh area indicated that they had taken part in some sporting/outdoor activities during their trip to the Highlands (59%), almost all of them had taken part in some non-sporting activities (99%).

The most common sporting activity was *low level walking* of between two and eight miles distance: almost half of the visitors to the area had participated in this activity during their trip (47%) making this far and away the most popular sporting/outdoor activity. Cycling/mountain biking was the next most popular outdoor activity, undertaken by 9% of visitors, whilst longer distance walks and hillwalking were undertaken by 8% of visitors to the area, and a similar percentage went mountaineering or rock climbing (8%).

As might be expected, *general sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to Skye and Lochalsh, carried out by almost all visitors to the area (97%). Over half (56%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by four visitors in every ten (41%). Whilst visits to wildlife attractions and attendance at concerts, ceilidhs, theatre and cinema amounted to 18% and 10% of visitors' activities, no other single activity was participated in by more than 8% of visitors to the area.

In comparison with the Highlands as a whole, similar proportions of visitors to Skye and Lochalsh took part in sporting activities/outdoor pursuits (59% in each case). However, mountaineering and rock climbing was rather more popular in Skye and Lochalsh than the average across the Highlands (8% and 4% respectively) whereas golf (3% and 6%) and hill walking (8% and 11%) were slightly less popular.

When asked to indicate which one activity, if any, could be described as their main activity during their trip, only 8% of visitors mentioned a sporting activity - significantly less than the average across the Highlands as a whole (17%). Low level walking (4%) and mountaineering (2%), were the only two outdoor activities mentioned by more than 1% of visitors. As many as 92% described a non-sporting activity however, with general sightseeing/touring far and away the main activity undertaken (90% of visitors).

Visitors to Skye and Lochalsh therefore, would appear rather more likely to be undertaking non-sporting activities on their visits and less likely to be taking part in sporting pursuits.

Attractions visited and levels of satisfaction

Attractions visited

Respondents were presented with a list of attractions in the area and asked to indicate which ones they had already visited and which they intended to visit during their visit to the Highlands (see Table B-10 below):

Table B-10 - Attractions visited in Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh

	Skye and Lochalsh
Eilan Donan Castle, Dornie (1)	31
Dunvegan Castle, Dunvegan (1)	29
Clan Donald Centre, Sleat (1)	21
Talisker Distillery, Carbost	9
Aros: Skye Heritage Centre, Portree	8
NTS Gardens, Balmacara	4
Museum of Island Life, Kilmuir	3
Skye Serpentarium, Broadford	3
Glenelg Candles, Glenelg	2
An Tuireann Arts Centre, Portree	2
Giant MacAskill Museum, Dunvegan	2
Loch Coruisk Boat Trip, Elgol	2
MacCrimmon Piping Centre, Borreraig	1
Toy Museum, Glendale	1
World of Wood Museum, Broadford	1
Raasay Heritage Museum, Raasay	1
Skye Riding Centre, Borve	1
Whitewave Activities, Linicro	*
Raasay Outdoor Centre, Raasay	*
None of these	41
Total:	**100**

(1) - Interview locations.
* - less than 0.5%

Overall, only around six visitors in every ten to Skye and Lochalsh had visited at least one of the attractions listed (59%). This proportion varied significantly by origin of visitors however, from 54% of visitors from other parts of the UK, to 56% of Scots and 66% of overseas visitors. Clearly, amongst all of the main markets, there are opportunities to promote the areas' attractions and encourage a greater number of visits.

Most popular were the area's two most well known castles: Eilean Donan and Dunvegan, visited by 31% and 29% of visitors respectively. Around one visitor in five had visited the Clan Donald Centre on Sleat (21%), but no other attraction had been visited by more than 10% of visitors to the area. The three main attractions had a number of key characteristics in terms of the types of respondents **most likely to visit**:

- *Eilean Donan (31% overall):* those aged under 35 (37%), those staying in hotels or B&Bs (36%) or who were caravanning/camping (39%), overseas visitors (38%) and first time visitors to the Highlands (36%),

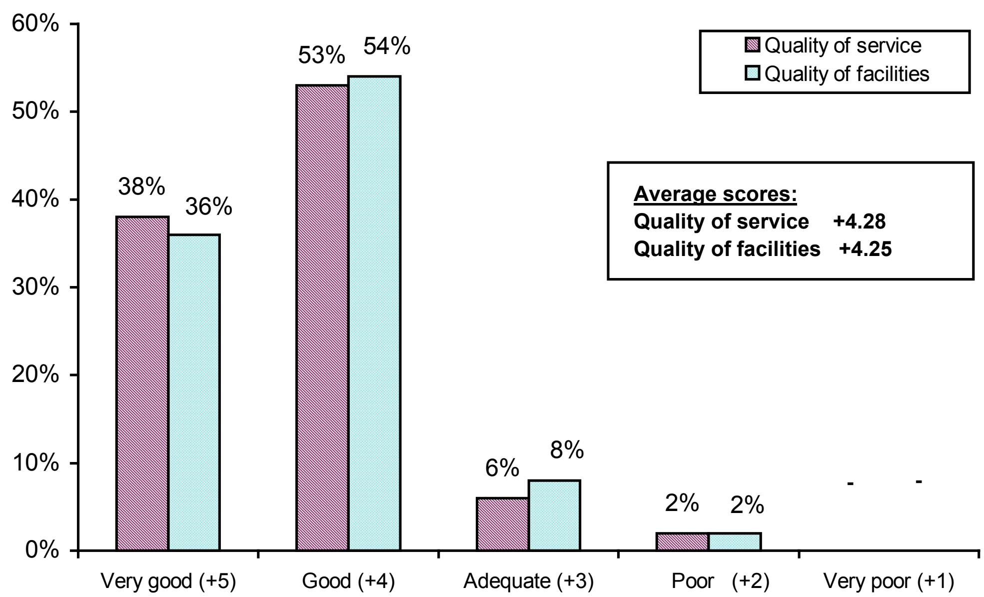
- *Dunvegan Castle (29% overall):* those aged under 35 (32%), ABC1s (31%), those on a touring trip (35%), those staying in hotels or B&Bs (34%), overseas visitors (32%) and first time visitors (33%);

- *Clan Donald Centre (21% overall):* those aged 35-54 years (27%), those staying in hotels or B&Bs (28%), those who had been to the Highlands before (24%), and those staying for eight or more nights in the Highlands (26%).

Levels of satisfaction with attractions

Those people interviewed in Skye and Lochalsh were asked to rate the quality of service and the quality of facilities experienced in visitor attractions:

Figure B-11 - Rating of attractions by visitors to Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh



Satisfaction levels with attractions visited in the Highlands were generally quite high amongst visitors to Skye and Lochalsh. Around four in ten (38%) described the quality of service as “very good”, whilst over half (53%) described it as “good”. Only 6% described it as merely adequate, whilst 2% felt service had been “poor” in Highland attractions.

Satisfaction levels were very similar regarding the quality of facilities experienced in attractions - similar proportions (36% and 54% respectively) described the facilities as “very good” or “good”.

As with accommodation, by applying “scores” from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland visitor attractions. Overall, both the quality of service and the quality of facilities achieved similar scores (+4.28 and 4.25 respectively). In terms of both the quality of service and the facilities, satisfaction levels were fairly similar across all of the main market segments.

Use of Tourist Information Centres and levels of satisfaction

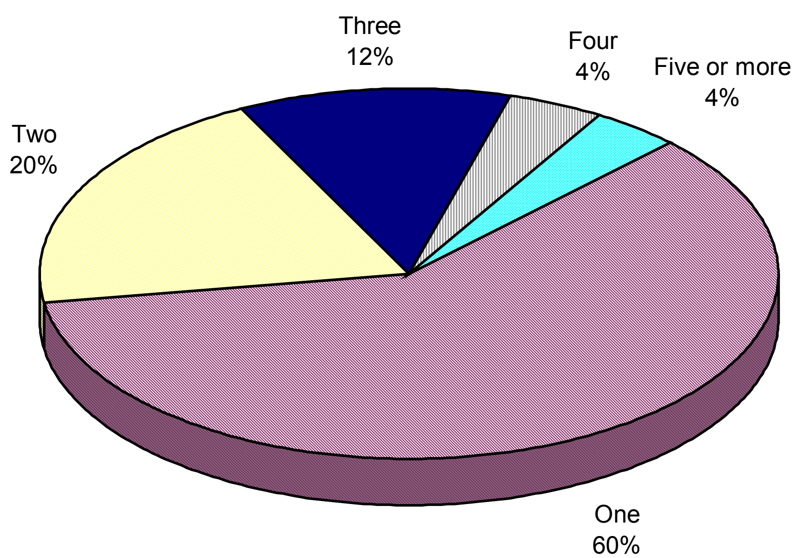
Visits to Tourist Information Centres in the Highlands

Over two thirds of those interviewed in Skye and Lochalsh had already visited a Tourist Information Centre (TIC) during their visit to the Highlands (69%), a higher proportion than that for Scotland as a whole (56%), and perhaps a reflection of the larger proportions of overseas visitors who were interviewed in Skye and Lochalsh. This is confirmed by analysing those markets most likely to visit a TIC: 80% of overseas visitors had done so. Visits to TICs were also more frequent amongst those aged under 35 years (73%), and those on touring holidays (82%), as well as those who were staying in the Highlands for over a week (84%) and those on their first ever visit (75%).

Amongst the 31% of visitors who had not visited a TIC on their trip, just under a fifth of them (18%) intended to visit one at some stage, whereas over three quarters (76%) had no intention of visiting a TIC. In total therefore, 74% of visitors had either already visited or intended to visit a TIC on their trip.

Those who had visited TICs on their trip were asked to indicate how many visits they had made:

Figure B-12 - Number of visits to Highland TICs
Base: 328 respondents in Skye and Lochalsh who had visited a TIC

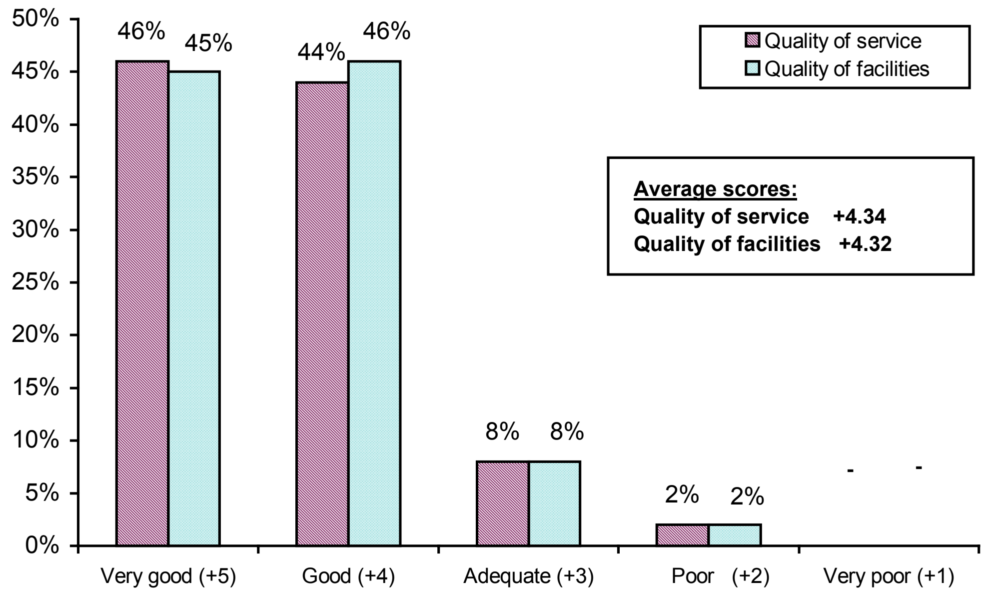


Around three visitors in every five (60%) had visited one Tourist Information Centre on their visit to the Highlands, whilst a further third (32%) had made two or three visits. A small minority were clearly practised TIC users: 4% had made five or more visits on their trip to the Highlands. On average, respondents had made 1.8 visits to TICs on their trip to the Highlands. Those on a touring trip (2.2 visits), from overseas countries of origin (2.0 visits), visiting the Highlands for eight nights or more (2.1 visits) and on their first ever visit (1.9 visits) were most likely to use TICs.

Levels of satisfaction with Tourist Information Centres

Those people interviewed in Skye and Lochalsh who had already visited a tourist information centre on their trip were asked to rate the quality of service and the quality of facilities experienced in Highland TICs:

Figure B-13 - Rating of TICs by visitors to Skye and Lochalsh (%)
Base: 328 visitors to Skye and Lochalsh who had used TICs



Note: (-) - nil respondents

Amongst those respondents who had used TICs in the Highlands, levels of satisfaction with both the quality of service and the quality of facilities provided were high: in each case, just under half described them as "very good" (46% and 45% respectively), whilst similar proportions described them as good (44% and 46%). Only 2% of TIC visitors described the service received and the facilities on offer as "poor" (N=6).

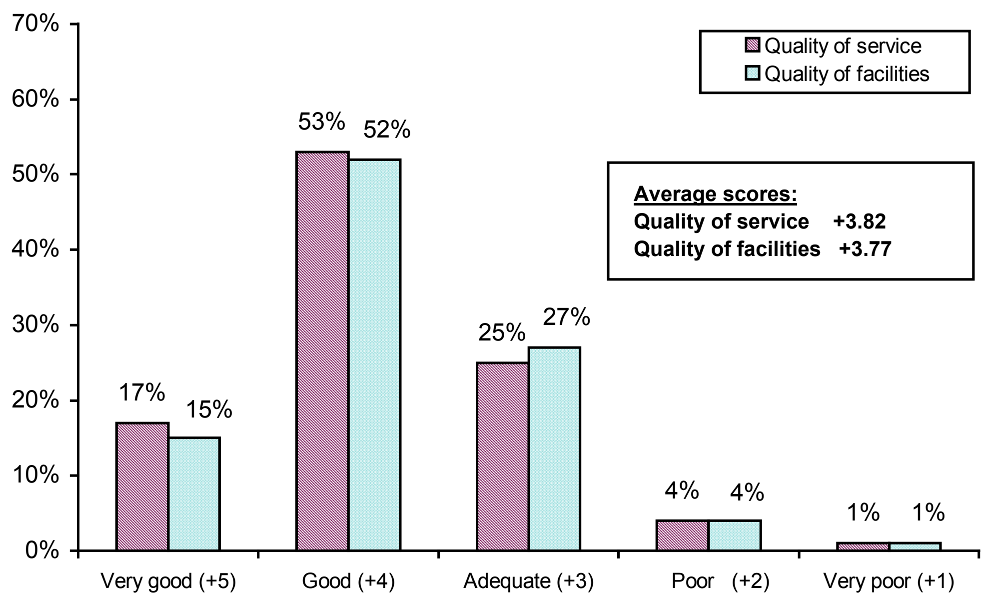
As with accommodation and visitor attractions, by applying "scores" from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland TICs. Overall, the quality of service and the quality of facilities obtained almost identical satisfaction scores of +4.34 and +4.32 respectively. There were no statistically significant variations in these scores amongst any of the key market segments.

Levels of satisfaction with shops, pubs and restaurants

In addition to levels of satisfaction with the quality of service obtained in their accommodation, attractions visited, and TICs as described in previous sections, respondents were also asked to rate the service and facilities in pubs and restaurants and in shops in the Highlands:

Ratings of Shops

Figure B-14 - Rating of shops by visitors to Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh



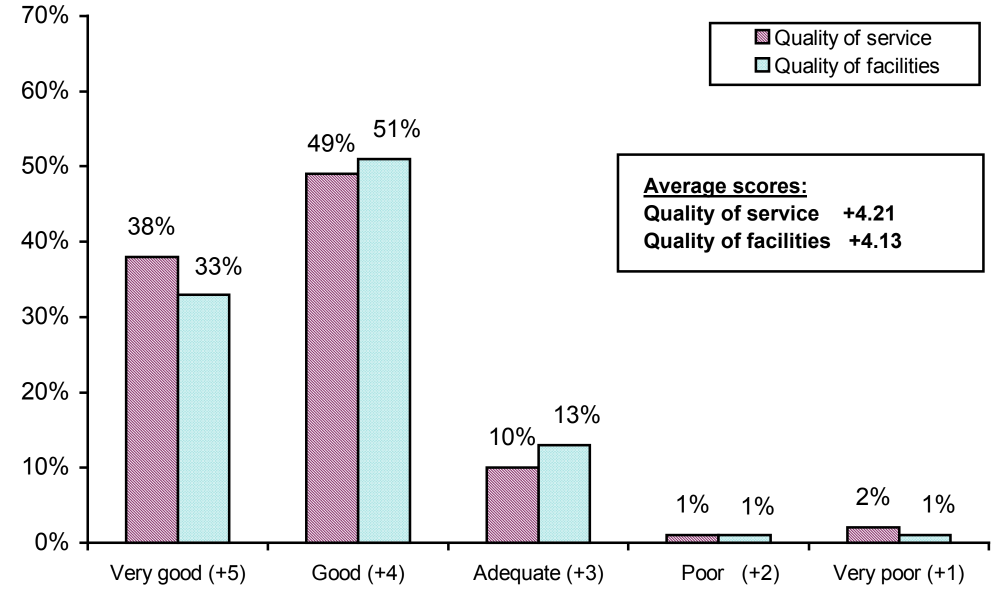
Note: (-) - nil respondents

Levels of satisfaction with shops in the Highlands are noticeably lower than for many of the other types of establishments measured. Although only 5% described both the quality of service obtained and the quality of facilities received as "poor" or "very poor", generally their satisfaction levels were slightly lower than for accommodation, visitor attractions and TICs in the Highlands. Less than 20% described either aspect of Highland shops as being "very good", although the majority of respondents did describe both the quality of service (53%) and the quality of facilities (52%) as "good".

Scores of +3.82 (service) and +3.77 (facilities) were obtained on average amongst the 477 respondents interviewed. There were no significant variations across the market segments analysed.

Pubs and Restaurants

Figure B-15 - Rating of pubs/restaurants by visitors to Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh



Note: (-) - nil respondents

As with most other aspects of the Highland tourism product, visitors to the Skye and Lochalsh area were fairly satisfied with both the quality of service and facilities on offer in Highland pubs and restaurants. Just under four in ten (38%) described the quality of service as "very good", whilst a further 49% described it as "good". The facilities on offer received similar ratings.

On average, the quality of service achieved an average score of +4.21 and the facilities achieved a score of +4.13. Satisfaction levels were marginally higher amongst older visitors and amongst Scots visitors, however the differences are not statistically significant.

Overall levels of Satisfaction

Attitudes and Opinions about Skye and Lochalsh

Visitors to Skye and Lochalsh were provided with a series of "attitude statements" about various aspects of the area, and asked to indicate the extent to which they agreed or disagreed with each of them. A mix of both positive and negative statements were included to reduce the effect of positive bias which often occurs. When respondents are given a list of positive statements, they are often predisposed to respond positively:

Table B-11 - Attitudes and Opinions in Skye and Lochalsh (%)
Base: 477 visitors to Skye and Lochalsh

	Agree strongly (+2)	Agree (+1)	Neither (-)	Disagree (-1)	Disagree strongly (-2)	Mean score
POSITIVE STATEMENTS						
- The Skye Bridge has made me more likely to visit Skye than before it was built	1	22	27	41	9	-0.44
NEGATIVE STATEMENTS						
- Signposting to places of interest in the area should be improved	2	19	19	59	1	-0.45
- There is not much to do in the area when it's raining	2	22	31	44	1	-0.28
- Now that I have visited Skye, I am unlikely to visit again for a long time	1	15	27	48	9	-0.64

By applying scores from +2 (agree strongly), to -2 (disagree strongly), it is possible to obtain a broad comparison of the relative strength of feeling about each statement.

"The Skye Bridge has made me more likely to visit Skye than before it was built":

Just under a quarter of visitors agreed with this statement (23%), although around half of those interviewed disagreed (50%). There were no significant variations in the levels of agreement amongst the various market segments.

"Signposting to places of interest in the area should be improved"

Three in five visitors disagreed with this statement (60%). However, with over one in five visitors in some agreement (21%), this would suggest that the issue of tourist signposting is worth addressing. With an average score of -0.45, the following groups would appear to be rather more likely to see signposting as a problem: the under 35s (-0.35), those staying in the one location (-0.39), and those staying for three nights or less (-0.37).

"There is not much to do in the area when it's raining"

Again, just under a quarter of visitors agreed with this statement (24%), and although in the minority (45% disagreed), this would suggest that there perhaps is a need either for more wet weather facilities, or alternatively, more information to visitors about what they can do when the weather is unpleasant. There were no significant differences in responses to this question amongst the key market segments.

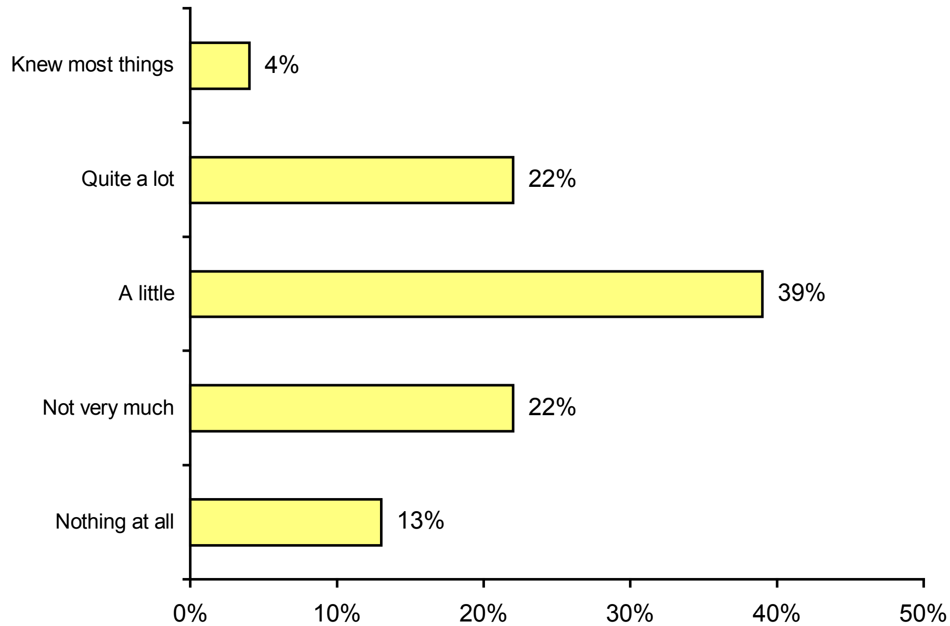
"Now that I have visited Skye, I am unlikely to visit again for a long time"

Encouragingly, only around one visitor in every six agreed with this statement (16%). Just under three in every five disagreed (57%), suggesting that the potential exists to persuade these visitors to return again at some time in the future. In particular, those on a centred holiday disagreed with this statement (62%), as did 70% of those who were on a repeat trip to the Highlands.

Prior knowledge of Skye and Lochalsh

Visitors to Skye and Lochalsh were asked to indicate how much they had known about the area prior to their visit (see Figure B-16 below):

Figure B-16 -Prior knowledge of Skye and Lochalsh
Base: 477 visitors to Skye and Lochalsh



The largest proportion of visitors to the area claimed they had known a little about Skye and Lochalsh prior to their visit (39%). On either side of this however, a slight majority claimed to have known even less than that (35%) than those who claimed to have known more than that about Skye (26%). This illustrates the potential which exists for the tourist industry in Skye and Lochalsh and the area tourist board to raise the profile of the area through further promotion.

Levels of prior knowledge about Skye and Lochalsh varied markedly between different market segments:

- *Age:* older visitors were more likely to know more about the area than younger visitors. 43% of those aged 55+ years knew either a lot or most things prior to visiting, compared to 13% of the under 35s;
- *Type of Holiday:* one third (34%) of those staying in the one location knew a lot or most things about the area, compared to 21% of those who were touring;
- *Origin:* only 14% of overseas visitors knew a lot or most things prior to visiting the area compared to 39% of Scots and 32% of those from other parts of the UK.

The visit to Skye and Lochalsh: Expectations vs. Reality

Another measure of visitor satisfaction was obtained by asking respondents how their trip to Skye and Lochalsh had compared with what they had expected (see Table B-12 below):

Table B-12 - How the trip to Skye and Lochalsh compared with expectations (%)
Base: 477 visitors to Skye and Lochalsh

	Skye and Lochalsh
Better than expected (+1)	30
About the same as expected (-)	60
Worse than expected (-1)	1
Didn't know what to expect	9
Total:	**100**
Mean score	+0.32

Encouragingly, three visitors in every ten to the area described their visit as having been better than expected (30%). Although three in five felt it had been much as they had expected (60%), and 9% had not known what to expect, it is particularly encouraging that only 1% described their visit as having been worse than expected, thus indicating high degrees of satisfaction.

There were some variations in these views amongst the main market segments: a larger proportion of those aged over 55 years claimed they had known what to expect (70%), whilst four in ten of those who were staying in the one location (39%) described their trip to the area as having been better than they expected. In terms of origin, the highest proportions of visitors who claimed their visit was better than expected were those from other parts of the UK (39%). This compares with 35% of Scots visitors and only 20% of overseas visitors who described it as having been better.

The fact that overall, as many as 30% of visitors described their visit as better than expected indicates the role to be played by those organisations who actively promote the area to visitors. Whilst the survey has also indicated that the majority of visitors had not been exposed to STB and ATB literature prior to their visit (23% had been influenced by a tourist brochure), this lack of awareness of what the area can offer indicates that there is real opportunity to address this through their literature and other promotional activities.

Those visitors who described their trip to Skye and Lochalsh as having been better than expected, were asked for their reasons. A large number of reasons were provided, although only five were mentioned by 10% or more of visitors:

- The weather (43%)
- Scenery picturesque (33%)
- General beauty of the area (14%)
- Friendly locals (13%)
- More to see and do than expected (11%)

Improvements which would have made the visit more enjoyable

Finally, in terms of their satisfaction, visitors were asked what improvements could have been made by the local bodies responsible for tourism to improve their trip to the Highlands. Those mentioned by 2% or more respondents are indicated below:

Table B-13 - Improvements which would make trip to Highlands more enjoyable (%)
Base: 477 visitors to Skye and Lochalsh

	Skye & Lochalsh
Roads - any mention of improvements needed	8
Too expensive	5
More/better signposting	4
Food/eating out - any reference to poor quality/value	3
Not enough tourist information	3
Opening times - Sunday, toilets, TICs, shops	2
More buses to more locations/increased frequency	2
Any references to improvements to accommodation	2
Lack of public toilet facilities	2
Nothing at all/very little	65
Total:	**100**

Around two thirds of those interviewed in Skye and Lochalsh did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (65%). Amongst those who did think improvements could have been made, the range and variety of suggestions were very large: no single improvement was mentioned by more than 8% of visitors. Improvements to the roads were mentioned by 8% of visitors, whilst the costs and expense associated with a holiday in the area were mentioned by 5%. Some 4% commented on improvements needed to the signposting in the Highlands. These three main suggestions were more frequently cited by the following segments:

- *Improvements to the roads:* C2DEs (13%), Scots visitors (15%) and those who had been to the Highlands before (11%);
- *Too expensive:* C2DEs (8%), Scots visitors (11%) and those who had been to the Highlands before (7%);
- *More/better signposting:* no great variations amongst any segments.

Expenditure

Visitors were asked to indicate how much they had spent on their trip to the Highlands. Only 9 respondents were on a day trip, therefore the analysis of expenditure provided below refers to the 468 respondents who stayed overnight (tourists).

Respondents were first of all asked how much they had spent on various elements of their trip over the previous 24 hours on themselves and any other members of their party. They were then asked how many people this expenditure had covered. Table B-14 provides the average daily expenditure by respondents (including that spent on others) and daily expenditure per person, per day:

Table B-14 - Amount spent per day

Base: 468 visitors to Skye and Lochalsh staying overnight in the Highlands
3,080 visitors to the Highlands staying overnight

	Spend per night (including on others)....		Spend per night per person....	
	in Skye and Lochalsh	**in the Highlands**	**in Skye and Lochalsh**	**in the Highlands**
Accommodation	£33	£38	£18	£18
Food and drink (outside accommodation)	£22	£23	£12	£10
Entertainment	£2	£5	£1	£2
Shopping	£12	£14	£6	£7
Transport	£13	£12	£7	£6
Total:	**£82**	**£92**	**£45**	**£43**

Typically, respondents in Skye and Lochalsh spent £82 per day during their trip to the Highlands on themselves and others in their party, around £10 less than the average in the Highlands. This averaged out at a spend of £45 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (40%) followed by food and drink (27%).

The following market segments spent *more* on average of per person per day:

- those staying in hotels and guesthouses (£68) and in bed and breakfast establishments (£51), overseas visitors (£49), those staying for 3 nights or fewer (£51), and those visitors on their first trip to the Highlands (£50).

The following markets spent *less* on average per person, per day:

- those aged under 35 years (£42), those who were on a caravanning or camping trip (£29), Scots visitors (£38), and those staying for eight nights or more (£39).

By applying the average length of stay figures to the daily expenditure estimates indicated in Table B-14, it is possible to obtain estimates of spending on a "per trip" basis. The table below provides an indication of the average spending on the trip which took place within the Skye and Lochalsh area. Figures are also provided for comparison of spend per trip to the Highlands as a whole:

Table B-15 - Amount spent per trip
Base: 468 visitors to Skye and Lochalsh staying overnight in the Highlands
3,080 visitors to the Highlands staying overnight

	Spend per trip (including on others)........		Spend per person per trip.......	
	in Skye and Lochalsh	**in the Highlands**	**in Skye and Lochalsh**	**in the Highlands**
Average length of Stay	*3.1 nights*	*7.0 nights*	*3.1 nights*	*7.0 nights*
Accommodation	£102	£266	£56	£126
Food and drink (outside accommodation)	£68	£161	£37	£70
Entertainment	£7	£35	£4	£14
Shopping	£37	£98	£19	£49
Transport	£40	£84	£22	£42
Total:	**£254**	**£644**	**£138**	**£301**

Typically, respondents in Skye and Lochalsh spent around £250 during their trip to the area on themselves and others in their party. This averaged out at a mean spend of just under £140 per person on their trip to the area. Given the average length of stay in the Highlands as a whole was 7 nights, the per trip expenditure was considerably higher (£301 per person).

Reflecting the variations in length of stay, those segments spending more (and less) per trip in Skye and Lochalsh were not necessarily the same as those spending more or less on a daily basis. The following market segments spent *more* on average per person per trip:

- those staying in the one location (£163), those who were in self-catering accommodation (£230), and visitors from other parts of the UK (£162).

The following markets on the other hand spent *less* on average per person, per trip in Skye and Lochalsh:

- those aged under 35 years (£122), those staying in bed and breakfast establishments (£117) or in caravans (£104), and overseas visitors (£122).

By multiplying the trip spending figures by the average party sizes, it is also possible to obtain estimates of the average party spend in Skye and Lochalsh amongst the different market segments. This is summarised below:

Table B-16 - Spending per party in Skye and Lochalsh
Base: 468 visitors to Skye and Lochalsh staying overnight in the Highlands

	Spend in Skye and Lochalsh				
	Spend per person per day	**Average length of stay**	**Spend per person per trip**	**Average party size**	**Spend per party per trip**
Age					
15-34	£42	2.9 nights	£122	2.41	£294
35-54	£47	3.2 nights	£150	2.52	£378
55+	£47	3.2 nights	£150	2.30	£345
Social Class					
ABC1	£47	3.0 nights	£141	2.40	£338
C2DE	£41	3.5 nights	£144	2.52	£363
Type of Holiday					
Centred	£43	3.8 nights	£163	2.78	£453
Staying in 2 or 3 locations	£50	2.5 nights	£125	2.33	£291
Touring	£42	3.0 nights	£126	2.20	£277
Accommodation Used					
Hotels/Guesthouses	£68	2.2 nights	£150	2.19	£329
Bed and Breakfasts	£51	2.3 nights	£117	2.32	£271
Self-catering	£39	5.9 nights	£230	3.26	£750
Caravan/Camping	£29	3.6 nights	£104	2.44	£254
Origin					
Scotland	£37	3.3 nights	£132	2.64	£348
Other UK	£45	3.6 nights	£162	2.44	£395
Overseas	£49	2.5 nights	£122	2.32	£283
Total:	**£45**	**3.1 nights**	**£140**	**2.43**	**£340**

In terms of total trip spending per party in Skye and Lochalsh, the average spend was £340. The highest spenders by some margin were those staying in self-catering establishments (£750), followed by those who were basing themselves in the one location (£453). On the other hand, lowest spenders were those who were camping/caravanning (£254), those on touring holidays (£277), those staying in bed and breakfast establishments (£271), and overseas visitors (£283). Whilst the low spend of this latter category may appear surprising, this reflects the shorter stay in the area amongst overseas visitors and their smaller party sizes.

C. Multivariate Analysis

In the production of cross-tabulations in visitor surveys of this type, it is often difficult to isolate the factor(s) which are of most significance in influencing the pattern of visits to a particular area. Consequently, some multi-variate analysis was conducted on the datasets of respondents interviewed in Skye and Lochalsh in an attempt to identify the key variables within the various market segments. This process was undertaken using the segmentation modelling program, **SPSS CHAID** (Chi-Squared Automatic Interaction Detector) which is described in some detail below.

Multi-Variate Analysis – the Process

SPSS CHAID is a segmentation modelling program designed for analysing categorical data. It is useful in any situation in which your overall goal is to divide a population into segments that differ with respect to a designated criterion. In a CHAID analysis, a dependent variable is selected and an explanation for any variation in this variable is sought by analysing the data in terms of a number of predictor variables (e.g. age, social class, lifecycle characteristics etc.).

In the case of the Highlands Visitor Survey, a number of predictor variables were applied to each of the subregional areas to identify significant relationships between variables. Predictor variables included age, social class, origin, presence of children and whether or not visitors were on a first time or a repeat visit to the Highlands. Each of the predictor variables was cross-tabulated with the dependent variable - the interview location, to establish the most significant relationships.

This analysis identified the key market segments for the Skye and Lochalsh area, illustrating which of the lifestyle characteristics were most significant, and consequently which market segments would be likely to produce most *gains* to the area if they were targeted.

This analysis of the Highlands Visitor Survey data at the sub-regional level identified twelve market segments. Their composition, together with their share of the total tourism market to the Highlands is indicated below:

Market Segments	**Share of the Highlands visitor market**
• Highland residents	6%
• Other Scots residents, aged under 35 years, no children in household	5%
• Other Scots residents, aged 35-64 years, no children in household	10%
• Other Scots residents, aged under 65 years, children in household	7%
• Other Scots residents, aged 65+ years	4%
• Other UK residents, 1st ever visit to the Highlands, aged under 45 years	6%
• Other UK residents, 1st ever visit to the Highlands, aged 45-54 years	2%
• Other UK residents, 1st ever visit to the Highlands, aged 55+ years	3%
• Other UK residents, repeat visit to the Highlands	29%
• Overseas residents, children in the household	3%
• Overseas residents, no children in the household, 1st ever visit to the Highlands	17%
• Overseas residents, no children in the household, repeat visit to the Highlands	6%

For the purpose of clarity, a definition of these market segments is provided below:

Highland residents: *those who live within the Highlands council area (inc. Moray)*
Other Scots: *those who live outwith the Highland council area*
Other UK: *those who reside in England, Wales and Northern Ireland*
Overseas: *those who live outwith the United Kingdom (inc. Ireland)*
Children: *classified as a dependent minor aged under 18 years*
1st visit: *1st ever visit to the Highlands of Scotland*
Repeat visit: *those who have visited the Highlands at least once before*

An analyis of the segmentation analyis of the respondents interviewed in Skye and Lochalsh follows overleaf.

Visits to Skye and Lochalsh – 15% Share overall

Dependent and Predictor Variables

Dependent variable: those visiting Skye and Lochalsh;
Predictor variables: age; social class; origin; incidence of children present; 1st time/repeat visitors

Key Predictor Variable

Origin of Visitors

Market Segmentation

In the following table, the first column (incidence of visits to the area) shows the percentage of each market segment which was attracted to Skye and Lochalsh. For example, 21% of other UK residents on their first ever visit and aged 45-54 years who were visiting the Highlands visited Skye and Lochalsh. The second column shows the propensity of that group to visit the Lochaber area in comparison with the average for other parts of the Highlands. For example, the same group of other UK residents on their first ever trip to the Highlands and aged 45-54 years are 47% more likely to visit Skye and Lochalsh than average. Visitors who are less likely than average to visit the area are shown as a negative percentage.

Market Segment	Incidence of visits to area	Above/below average incidence of visiting
- **Overseas residents, no children in the household on 1st ever visit**	**24%**	**+65%**
- **Overseas residents, no children in household, on repeat visit**	**23%**	**+56%**
- **Other UK residents, on 1st ever visit to Highlands, aged 45-54**	**21%**	**+47%**
- **Other Scots residents, aged under 35, no children in household**	**16%**	**+10%**
- Other UK residents, on 1st ever visit to Highlands, aged under 45	14%	-5%
- Other UK residents, on repeat visit	13%	-7%
- Other Scots residents, aged 35-64, no children in household	12%	-18%
- Overseas residents, children in the household	12%	-20%
- Other UK residents, on 1st ever visit to Highlands, aged 55+	9%	-34%
- Highland residents	8%	-44%
- Other Scots residents, aged under 65, children in household	6%	-59%
- Other Scots, aged 65+	3%	-77%

Skye and Lochalsh was most popular amongst visitors from overseas without any dependent children – the two segments most likely to visit the area were made up of these types of visitors, with those on their first ever trip to the Highlands rather more likely to visit Skye than those on a repeat visit (65% and 56% above average respectively). Generally, Scots residents, particularly those with children, were least likely to visit Skye and Lochalsh.

D. Social Class Definitions

A
- UK: 3% of the population;
- These are professional people, or are very senior in business or commerce, or are top civil servants
- Retired people, previously grade A, and their widows

B
- UK: 18% of the population;
- Middle management executives in large organisations, with appropriate qualifications
- Principle officers in local government and civil service
- Top management or owners of small business concerns, educational and service establishments
- Retired people, previously grade B, and their widows

C1
- UK: 27% of the population;
- Junior management; owners of small establishments; and all others in non-manual positions
- Jobs in this group have very varied responsibilities and educational needs
- Retired people, previously grade C1 and their widows

C2
- UK: 24% of the population;
- All skilled manual workers, and those manual workers with responsibility for other people
- Retired people previously grade C2, with a pension from their job
- Widows, if receiving pensions from their late husband's job

D
- UK: 16% of the population;
- All semi skilled and unskilled manual workers, and apprentices and trainees to skilled workers
- Retired people, previously grade D, with a pension from their job
- Widows, if receiving a pension from their late husband's job

E
- UK: 12% of the population;
- All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding 6 months (otherwise classified on previous occupation)
- Casual workers and those without a regular income
- Only households without a chief wage earner are coded in this group

E. Questionnaires